



How to Effectively Invite People to Pilgrimage

A Step-by-Step Guide to Comfortably and Confidently Ask People to Attend

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Introduction

Who are the people you just KNOW would benefit from going to their own Pilgrimage weekend? Do you feel uncertain about how to invite them effectively? Or, have you invited someone repeatedly and been unsuccessful?

If so, then this guide is for you. What you are about to learn will likely upend your assumptions about inviting new Pilgrims.

Most of us think that inviting goes something like this: “Hey, you should go on a Pilgrimage weekend. You’ll love it!” and then hand the person a brochure with all the details or direct them to the website. When all of our joy, enthusiasm, and encouragement doesn’t translate into someone saying “yes,” it can be frustrating and discouraging.

This guide is designed to be a workbook offering step-by-step instructions to immediately implement the principles of effectively inviting someone. Simple exercises will equip you to comfortably and confidently be the critical missing link between a potential Pilgrim and a new member of 4th Day. Plus, an easy-to-follow eight step checklist will help you quickly implement what you learn.

So, are you ready to successfully invite those people you thought of? Then keep reading.

Why Most Communities Fail at Recruitment

The Problem – “Field of Dreams” Invitations

God calls people through us. That’s why “invite” is the operative word in the title of this workbook. Communities with a “Field of Dreams” approach, a.k.a. “have the weekend and they will come,” are doomed to dwindling attendance and ultimate extinction. We must be deliberate and intentional in inviting people to a Pilgrimage weekend to be successful at it.

Scattershot approaches of distributing brochures, bulletin inserts, and newsletter announcements are doomed to fail without a strategy for personally inviting people. To understand this, it helps to understand some fundamentals of marketing. Then you won’t unwittingly misuse the strategies you are going to learn and be left wondering why.

Critical Marketing Principles

Yes, “marketing.” Do you have an aversion to that term? If so, you aren’t alone. Many people, particularly in the church, cringe at the word. Perhaps, it’s because “marketing” sounds so secular and we don’t like to think of our churches as businesses. That said, you are invited to let go of any prejudice around that word and consider marketing in its most basic sense.

Marketing is the process of effectively offering someone what you have of value so that they act on the offer. In business, marketing is offering a product and the act is purchasing. In the Pilgrimage community, you are offering a weekend of spiritual renewal and the act you seek is attendance.

Most of us are not good at this, mainly because we don’t understand the process most people must go through to say “Yes” and attend. We assume (hope?) all we have to do is tell people an event is happening, and they will flock to it. Unfortunately, invitations don’t work that way. Why?

Stages of Readiness

People must pass through several “Stages of Readiness” prior to taking action. These stages of readiness are:

- Awareness
- Interest
- Desire
- Action

Let’s look at each in the context of someone deciding to attend a Pilgrimage weekend:

Awareness: The potential participant has to know the weekend exists. The scattershot approaches discussed earlier can communicate the particulars such as when and where the event is. Sometimes the name of the Moderator or a Spiritual Advisor is relevant, especially if the person you’re inviting is familiar with them. In marketing these particulars are referred to as FEATURES. But making people aware is only the first stage. Most unsuccessful recruiting efforts start and end here.

Interest: Potential participants have to believe the weekend will be worth their time. You must capture their curiosity. You need to present the VALUE of the offer, so they THINK or FEEL that a renewal weekend might benefit them. Value can be removing a pain point and/or creating a gain. For example, “Attend a weekend and be renewed by being served and spiritually fed.” Or, less generically, they may connect with your personal testimony about the weekend. Marketers refer to these interest-capturing devices as the BENEFITS.

Desire: Potential participants have to want to attend. You have to further connect with their NEED for the weekend and remove OBJECTIONS that may be holding them back. Desire sometimes won't be present until an event in their own lives heightens their sense of need.

Action: Potential participant have to respond positively. You need to ask for the "yes" by presenting a CALL TO ACTION such as, fill out this registration form, go to the website and register, or give me a few details and I can register you right now.

The Solution: Need/Benefit Focused Invitation

Most communities' scattershot approaches usually start and end with features, so you can see it isn't realistic to expect action to result from features, skipping the stages in between. To successfully help someone navigate the stages of INTEREST and DESIRE, the need for a weekend must be interpreted through the perspective of a person's unique spiritual need. A brochure cannot identify and respond to someone's need. But, you can, and it is easier than you might think. You want to begin by considering the needs of people you know and how they may benefit.

Profiles of common spiritual needs

Following are a few "profiles" of people who may benefit significantly from a Pilgrimage weekend. Who comes to mind as you read these descriptions?

Weary Servants: Those who are constantly serving others, i.e. teachers, mothers, caregivers, the 20% of the people at church who do 80% of the work, etc. Think of what a renewing respite a weekend of being served could mean to them.

✝ This person will BE SERVED.

Burdened: People who are either carrying their own sins or those of someone who has sinned against them. They may have feelings of unworthiness, guilt, shame, anger, etc. Think of how the weekend could enable them to become a new creation by leaving their burdens at the Cross.

✝ This person may BE FREED.

Broken: Those mourning failed relationships, estrangement from family, health issues, death of a spouse or other family member, etc. NOTE: If someone is broken, whether through tragedy or intense loss, it is possible to invite them too soon. Consider this carefully before asking.

✝ This person may BE HEALED.

Unemployed: A protracted job search or underemployment can cause people to question their worth, cause self-doubt, financial stress, etc. Think of how a break from their job search surrounded by unconditional love and acknowledgement could leave them knowing with certainty that there is a place for them in God's Kingdom. If scholarship monies available, there may be no better time to attend a weekend.

✝ This person will receive ENCOURAGEMENT and may return RENEWED and CONFIDENT.

In a Spiritual Rut: People in a spiritual rut may be going through the motions by attending church but otherwise walking in place on their faith journey. If you ask them what their plans are this year to enrich their spiritual life, they will not have an answer.

✝ This person may BE INSPIRED to move forward on a purposeful faith journey.

New Church Members or others who are seeking deeper connections: These people may be eager to expand their group of Christian friends and to become part of a larger Christian community, or, they may be shy but craving connection.

✝ These people will get exactly what they seek, FRIENDSHIP and CHRISTIAN COMMUNITY.

Church Leadership: Both ordained and lay persons. They are influential and lead their flocks and church families. The Pilgrimage experience and the communal nature of the 4th Day is something that most denominational churches need in order to thrive (and even survive).

✝ These people will BE EQUIPPED by the experience with a new tool to energize their congregations and increase discipleship.

Whether a potential participant fits one of these spiritual need profiles or not, remember that the Holy Spirit, through Pilgrimage, has an uncanny way of meeting people where ever they are on their faith journey.

Stage of Readiness	Audience Need	Marketer's Role
Awareness	KNOW that the offer exists	Provide information about the FEATURES of the offer (Printed material and announcements are helpful.)
Interest	BELIEVE the offer may be worth the time/money/effort	Capture curiosity by presenting BENEFITS (Sharing your testimonial is your greatest tool for this stage.)
Desire	WANT the offer	Connect with the NEED and remove OBJECTIONS (Listening and "Profiling" is essential at this stage. Anticipating questions and providing answers is critical.)
Action	RESPOND to the offer	Present a CALL TO ACTION (You can identify this stage with some "trial closes.")

EXERCISE 1 – MAKE A LIST

ACTION STEP: Create a list of people who come to mind for you as having a spiritual need. Insert their names, description of what you believe their need may be, and how they might be feeling. Use more paper if necessary.

Name: _____

Need: _____

Feelings: _____

Name: _____

Need: _____

Feelings: _____

Name: _____

Need: _____

Feelings: _____

RECOMMENDED ACTION STEP: Do this exercise at the renewal group or church level. Meet to collate your lists and assign the “best person” to reach out to each potential participant. “Best” may be from a standpoint of the closest personal relationship, most common interests, who best understands the person’s spiritual needs, or simply who is the most comfortable doing it.

Track the contacts made with potential participants and coordinate your efforts. While it often takes multiple touches for someone to say “yes” to Pilgrimage, too many overtures during the same recruiting push can quickly turn off an otherwise would-be Pilgrim. Make your lists accessible to all group members. Using a Google document or similar online tool can be helpful. Shared documents enable immediate access to the current status of anyone being invited.

Now that you know whom to invite, let’s explore how to invite them.

Your Most Powerful Asset – Your Testimony/Experience

Your testimony about what Pilgrimage did for your own spiritual journey is essential. It’s the glue that may successfully wed the needs and desires of the potential participants with the offer of going. Keep in mind that your testimony is not theirs, so their experience may be different.

You need to have your testimonial ready to share. Also, you need to be prepared to speak to the needs which the potential participants may feel as identified in the profiles. This is not as difficult as it may seem, but absolutely necessary.

NOTE: “Testimony” is a word that carries a lot of baggage for some people. Perhaps you have been witnessed to in a way that felt manipulative or contrived. No worries. Complete the exercise on the next page and you will have the essential elements you need to share your testimony/story in a conversational (not pushy or manipulative) manner. How to share your testimony comes after the exercise.

EXERCISE #2 – RECONNECTING WITH YOUR TESTIMONY

ACTION STEP: Answer the questions below. You may want to use other paper so as not to limit your answers.

1. Describe the situation or problem you were dealing with prior to attending the Pilgrimage weekend, and/or describe what your faith was like prior to Pilgrimage.

2. Describe how you felt. Did one of the seven profiles described earlier match your condition?

3. What did you learn or experience on the weekend that helped you improve your situation or faith? How did God touch your life?

4. How did your situation get better? What positive change did you experience in your situation or faith?

5. How did you feel after this change?

Do you see the essential elements in the testimonial?

- Situation prior
- Feelings about it
- What I learned/experienced
- The change it created
- The new feelings

It's simple. When sharing your testimony, capturing and sharing the feelings are critically important. INTEREST and DESIRE, the middle stages of readiness, are moved more by feelings than facts or features. Furthermore, even if your situation does not directly resonate with someone else's need, the emotional journey may forge a connection.

For example, a weary church servant may be talking to an overwhelmed mom. She won't necessarily connect with your experience of being at a thousand meetings, but she will definitely connect with the feeling of being overwhelmed and worn out. Your story of finding renewal and energy or being served will readily connect. She can track the emotional journey and find herself in your story IF you are sure to include those feelings.

Are you ready to go invite? Yes. You have your list, your testimony, and maybe even a little excitement. You have everything you need, but before you extend any invitations, let's cover some nuts and bolts details.

Taking it to the Street: Nine Rookie Mistakes and How to Avoid Them

Rookie Mistake #1: Referring to Pilgrimage as a "retreat"

- **Solution: Speak in terms of a renewal weekend**

Language is loaded, so, be intentional about what you say. Speak about Pilgrimage as a RENEWAL WEEKEND not a RETREAT. While Pilgrimage is a retreat-style event, that language is loaded for many people. They will likely immediately pigeonhole their impressions based on prior retreat experiences. This can drive decision-making. For example, they may think, "Well, I am already going on the women's retreat in March, I don't need this."

Also, "retreat" is intrinsically a feature word with no persuasive value. "Renewal," however, is a value word that in and of itself begins to speak to a need and the nature of the weekend.

Rookie Mistake #2: Starting too late

- **Solution: Begin at least 60 days out**

Begin your recruitment at least 60 days out. This may seem early, but many people fill their calendars weeks in advance or must request time off work far in advance. The longer you wait, the less available someone becomes.

Furthermore, there is every possibility you may need multiple conversations. Your first conversation may just get someone through the first stage or two of readiness, AWARENESS and INTEREST. A prospective Pilgrim might have to check schedules and get back with you.

Lastly, though you want to start early for Spring renewal weekends, wait until after January 1st. The holidays are too busy and filled with distractions for people to give your invitation the attention it requires. Similarly, for Fall weekends, wait until after Labor Day, if you can. NOTE: this requires CONSCIOUS SCHEDULING of the weekends by your community. Weekends in February or October will shorten this timeline and therefore limit your potential attendance.

Rookie Mistake #3: Inviting after church or in passing

- **Solution: Schedule an uninterrupted time to talk**

Coming up to someone after church and saying, “Hey, there is a Pilgrimage weekend coming up in April do you want to go?” is a bad idea. After church most people keep conversations short. They are likely already busy and thinking about lunch or whatever is next on their list.

Instead, request a time, saying, “I need to talk to you about something. When would be a good time to call?” Or ask if they might prefer to meet over coffee, lunch, etc. The key is to schedule a conversation that won’t be rushed. You want time to share your testimony, answer questions, and listen for the needs or concerns that might be holding them back from going. For example, they may have a misimpression or wrong assumption that you can easily address, but only if you listen carefully.

Rookie Mistake #4: Leaving registration up to them to do later

- **Solution: Help them personally through the registration process**

Have the registration form loaded and pre-populated with their data as much as you are able, ready to submit the moment they say “Yes.” Don’t expect them to complete the form; do it for them. This might feel pushy to you, but it’s actually quite the opposite.

If you pre-populate the form, once they say yes all you have to do is fill in a few blanks. Say something like, “Great. All I need to complete your registration is to ask a few simple questions. Do you have any allergies or special dietary needs? Do you...” Contrast that experience to leaving it in their hands and then having to repeatedly ask them, “Hey, have you registered yet?” Odds are that’s what will happen if you don’t help them actually complete their registration.

Remember: Gather the data needed to complete the form BEFORE you make a call. You want it in hand, so when they say “yes” you are ready to register them as quickly and easily as possible.

Rookie Mistake #5: Focusing on features rather than benefits

- **Solution: Lead with your testimony and focus on benefits**

When you call lead with your testimony. The FEELING that the weekend could be valuable to them is what MOTIVATES them to eagerly want to attend, not how many days it is, where it’s held, how much it costs, etc. Those factors are secondary in terms of their desire to attend or not. Again, be prepared to speak to any spiritual need you are aware of.

Rookie Mistake #6: Being secretive about what happens on the weekend

- **Solution: Offer as much clarity as you can without giving away spoilers**

Someone is almost sure to ask, “What’s the weekend like?” or “What do you do?” One of the worst things you can do is to be evasive about what happens on the weekend. Don’t answer questions with replies like, “I can’t say, I don’t want to spoil any of the surprises.” Don’t even hint at “hidden” or “surprise” elements. This immediately will make many people wary or uncomfortable.

Describe some specifics such as, “People start arriving on Thursday evening around 5 when we gather for a short reception. Then we head to dinner 6. We will have worship and communion each day. Also, we have talks led mostly by lay people and then opportunities to discuss the talks.”

Be prepared to answer questions about logistics, such as: “Dress is comfortable. Wear what you would to be comfortable in at home; this isn’t a dress-to-impress occasion. Rooms are hotel-style (roommate likely), food is good. Plan on not being done until 4pm on Sunday.” And so forth. Before you know it, you will have put people at ease.

The DESIRE to go will be based upon their FEELING of value in the experience. Dwelling on logistical questions offers little motivation value. However, be aware that those small concerns can easily become deal-breaking objections if you do not provide the clarity they need.

Lastly, many people are much more comfortable knowing someone else they know is attending. If you are staffing, leverage that. Let them know, “I have volunteered to staff this Weekend; it would be an honor to serve you!” Or, let them know about others coming, “Jan’s also coming from our church.” Each person they know expands their personal comfort zone and lends social proof to the experience.

Rookie Mistake #7: Asking for a “yes” too quickly

- **Solution: Use “trial closes” to gauge desire**

If you share your testimony and they ask for more details, odds are they are teetering somewhere between the stages of INTEREST and DESIRE. They may even be trying to move

from DESIRE to ACTION. When most of those questions are answered, then it is time to test their readiness to say “yes.” Ask questions such as:

- How does it sound so far?
- Would your husband/wife like to join you?
- I have most of the form filled out; shall we reserve your spot?

NOTE: If they would love to go, but have a conflict with the dates; be prepared to sign them up for the next one right then. Say, “That’s not a problem the next one is _____, we can go ahead and register you now. If something comes up, canceling is not a problem, but it would be better to secure your spot, so you don’t miss out.”

Rookie Mistake #8: Not pursuing additional leads

- **Solution: Ask, “Is there anyone you’ve thought about going with you?”**

This one line can literally multiply your recruiting efforts. If the prospective Pilgrim thinks of others, offer to call them and facilitate their registration. The more people who go, the more other people will want to go.

Rookie Mistake #9: Giving up after someone says “no”

- **Solution: Regard “no” as “not now.”**

People say “no” for many reasons. Research has shown that people have to hear about something seven times before acting on it. Those stages of readiness are a real and unavoidable reality.

Your prospective Pilgrims may need the offer many times before they recognize the value and feel the desire to go. That’s okay. This need for repetition is just human nature. That said, if you practice the techniques shared in this guide, you will likely dramatically cut the need for multiple contacts.

The other factor at play (over which you have no control) is the person’s spiritual need. People will go when the pain of their need intersects with the possibility of relief on a weekend and NOT before.

One study showed that 99% of first-time guests in worship had a precipitant event within two months before their first visit. In other words, they had a death, job change, move, birth of a child, trauma, or some other major change. Those precipitant events put them in a mode of seeking a deeper connection with God. In another study 100% had a precipitant event.

The bottom line of this is God’s good timing isn’t always our timing. God will call someone on a weekend when the need is there. Our job is to keep our ears and eyes open to see those needs, so that God can use us to extend invitations when the time is right.

Don't give up. Some people are invited for years before saying "yes." The weekend can be life changing so don't stop inviting.

Making it Happen

All the plans and intentions in the world mean nothing if you don't execute. On the following three pages is an annotated check list to help you immediately act. Start those action steps now or set an appointment on your calendar with yourself to do so later. What gets scheduled gets done. What is intended gets delayed.

For further encouragement or consultation, feel free to contact:

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May you and your efforts be blessed and fruitful!

EXECUTION CHECKLIST

1: Get the “Scatter-Shooting Methods” covered

It was mentioned earlier that none of the measures of bulletin inserts, brochures, newsletter articles, etc. will get someone to register, BUT they do play a critical role by smoothing the way for you to invite. They can handle a lot of the information/awareness elements of helping someone toward attending a weekend.

Here are a few basics that you should make sure are covered in your church:

- Calendars (church and, perhaps, Presbytery: make sure the next TWO Weekends are on those calendars)
- Assure presence on Church website (under the Adult Discipleship tab? NOT under Retreats)
- Provide online registration for either of the next TWO Weekends
- Place brochures and registration forms in church and keep them replenished
- Include Pilgrimage in church announcements periodically
- Include an article about Pilgrimage in church newsletters two months prior to the weekend
- Have recent participants share their experiences, including in worship

Check off any or all of these you can and regularly revisit them, at least once a quarter.

Step 2: Complete your prospect list if you haven't already. (See Exercise #1)

- Complete your prospect list, noting possible spiritual needs and feelings of the prospect.
- Optional: Share list with a renewal group or your church's 4th Day, in person or perhaps using a tool like Google Documents.

Step 3: Prepare to share your testimonial. (See Exercise #2)

- Answer the testimonial questions so you can share your story conversationally.
- Optional: Practice with your renewal group or another member of the 4th? Day.

Step 4: Decide when you will speak to prospective Pilgrims

Complete the following sentence for each prospective Pilgrim and place a reminder on your calendar or in your phone. Place a check in the check box once you have contacted each one.

- I will ask _____ on _____ when I call or visit with her/him.
(Name) (Date)

I will ask _____ on _____ when I call or visit with her/him.
(Name) (Date)

I will ask _____ on _____ when I call or visit with her/him.
(Name) (Date)

Step 5: Gather data for the first prospective member you are going to contact.

- Pray for the person you will invite and ask for God's guidance.
- Gather the information needed to complete the registration form for each person you plan to invite.

Step 6: Review your progress.

Decide when you will follow-up with yourself. For example,

- I will review my progress every Sunday before church.
- I will review my progress when I meet with my renewal group.
- I will review my progress every two weeks.

Optional: You can dramatically increase your chances for successfully following through by reviewing your progress with your renewal group or another member of the 4th Day. Accountability is essential for sustained progress.

I plan to review my progress _____.
(interval or date)

Optional: I will review my progress with _____.
(accountability partner)

A word about what to do as a review....

Your review doesn't need to be complicated. It can be as simple as considering these three questions:

- What did I last do to invite this person?
- What worked well?
- What could I have done better?
- What should I do next and when?
- Other observations?

Write out your review. This is very important. You will be tempted to just think about these questions but failing to write is a huge mistake. For example, you might write:

"I asked Bob Sunday after church when I could call him. I called last Thursday. He seemed very interested but said he needed to check his calendar. I planned on pre-filling a registration form for him but forgot to do that. I'm going to do that this afternoon, so I don't forget or get busy and fail to get it done. I'm calling him back Friday to see if the dates are clear. I need to also let him know that Mark said he is going for sure. He seemed mostly concerned about the time he would have to take off."

Recording this information will be invaluable. These records remind you of what you have and haven't done. This becomes particularly important if inviting a prospective Pilgrim multiple times or if you are inviting multiple people. You don't want to confuse where people are in the process or people's need. And they will appreciate your remembering their details.

Give it a try and you will rapidly see the value.

- I wrote out my first review notes.

Step 7: Follow-up on additional leads

- I asked, "Have you thought about anyone you would like to go with you?"
- I have started following steps #4 through #8 with this new prospect by setting up a time to call or visit.

In Conclusion

At the end of the day, God calls and moves the hearts of people to say "yes" or "no" to attending a renewal week. You are likely the critical component in that call. Someone must bridge the gap between AWARENESS and ACTIONS. If not you, then who?

Successfully inviting people is a skill set. The skill set is learnable and repeatable. This document is a roadmap; you will encounter detours or find short-cuts. The Holy Spirit may call you off the beaten path. But try following this roadmap as these are tried and true processes.

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