

# Visitor Tracking

## Ministry Application

A church that is not attracting and bringing in new members is a dying church. Whether the church is actively evangelistic or not, there will always be visitors and new people who encounter the church. An active evangelistic church that tracks those who visit will see dynamic growth in its ministry.

## Visitor Records

The Visitor Records within the CDM+ Attendance program allow for tracking of visitors while keeping the information separate from the main CDM+ Membership database. Visitor Records has special tools, such as follow-up tracking to track the response of visitors to an evangelism program of the church. As persons become interested in the church, it is easy to transfer this information over to the Membership records. The Visitor Letter features of CDM+ are used exclusively with the Visitor Records in the Attendance program.

Date of Last Atten...	Last Name	Salutation	Visitor Status
Aug 19 2022	Johnson	Johnson Family	
Aug 21 2022	Lindendorf	Dwight and Angela	
Aug 21 2022	Gerrard	Bob and Phyllis	
Sep 4 2022	Thompson	Stan & Joy	First Visit

Johnson Family Johnson 12 Results

Family Name Information

Last Name: Johnson Suffix:

Mailing Name: Mr. & Mrs. George ID: 6

Salutation Name: Johnson Family

Label Name: The Johnson Family

Order	First Name	Last Name	Family Status
1	George	Johnson	Head of Household
2	Ann	Johnson	
3	Janet	Johnson	

Primary Address Alternate Address

Address: 698 Persimmon Tree Rd

City: Big City State: KY Zip: 40123

Country:  Carrier Sort:

Visitor Status:

Inactive  Directory  Newsletter

MapQuest

### ► Program ► Attendance ► Visitor Address Records

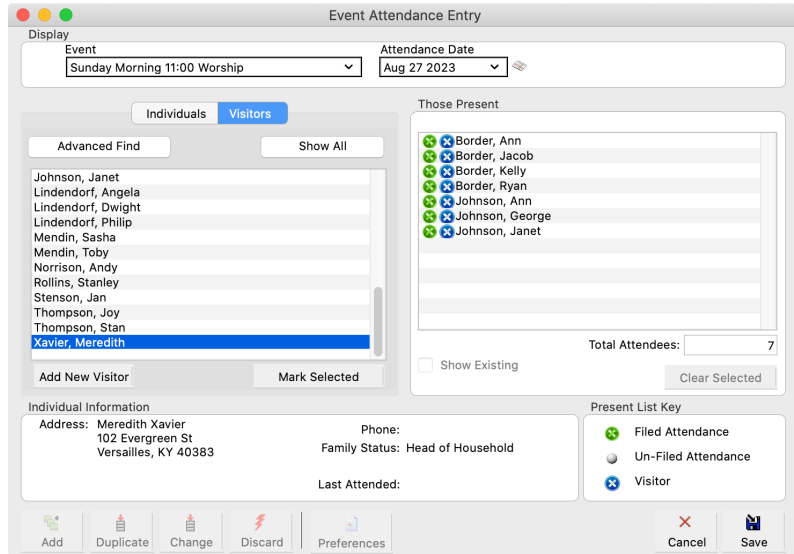
Note the additional information that can be maintained using Visitor Records, including:

- User-Defined Groups
- Follow-Up Ministry/Outreach Actions
- Additional Phones/E-mails
- Individual Attendance
- Comments

# Attendance Tracking of Visitors

► Program ► Attendance ► Event or Class or List Attendance

All attendance entry windows include a place to track the attendance of visitors to events, classes, and groups. A separate tab shows existing visitors on file and allows easy entry of new visitors.

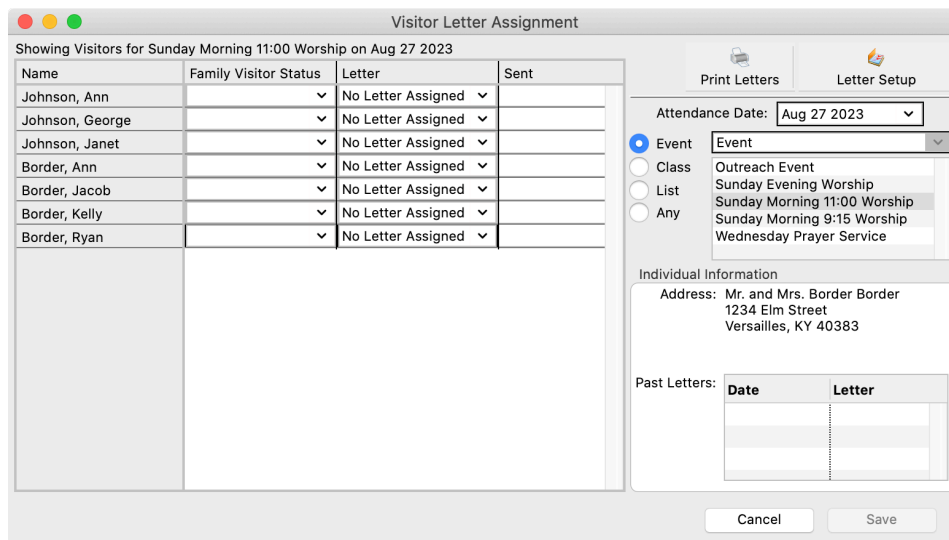


Visitor tracking is done of the individuals on the Visitor Records. When visitors are transferred to Membership, the history of their attendance as visitors will be included. In addition, to print visitor letters from Attendance, information must be entered on Visitor Records.

If the visitor is not already listed on the Visitors tab, simply click the Add New Visitor button at the bottom of the list. The Visitor Records window will open so you can enter the information. After clicking **Save** on the Visitor Records window, the name(s) will appear on the Visitors tab of the attendance entry window.

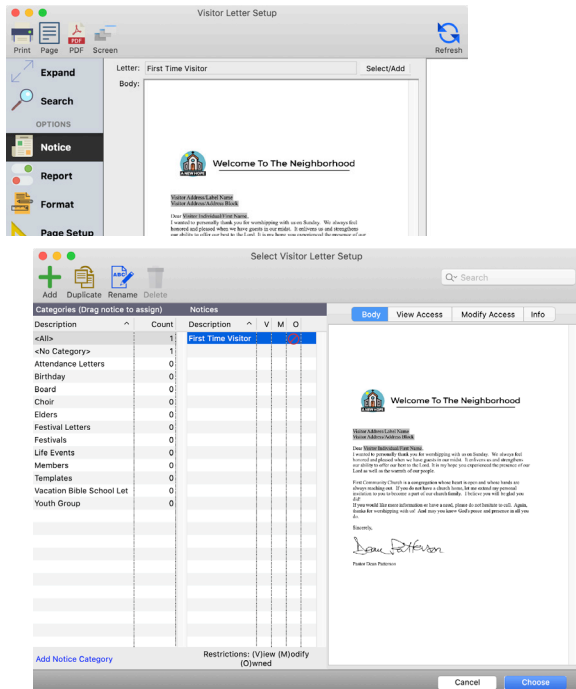
# Visitor Letters

► Program ► Attendance ► Visitor Letter Assignment



Here you assign letters to be prepared for printing by Event, Class, or Service.

## Create Visitor Letters



- Go to the Notice tab.
- Select the **Letter Setup** button at the top-right corner of the window (see image, opposite page).
- Visitor Letter Setup window will open.
- Click the **Select/Add** button. To change an existing letter, click once to highlight it, then click **Choose** to load it and make your changes.
- To add a new visitor letter, click the **Add** button to create a letter or click the **Duplicate** button to modify a copy of an existing letter.
- Click **Close** button to return to the Visitor Letter Assignment window (shown at left, top).

**NOTE:** Attend the Enhanced Notices class or refer to that section of this manual for more information on creating letters.

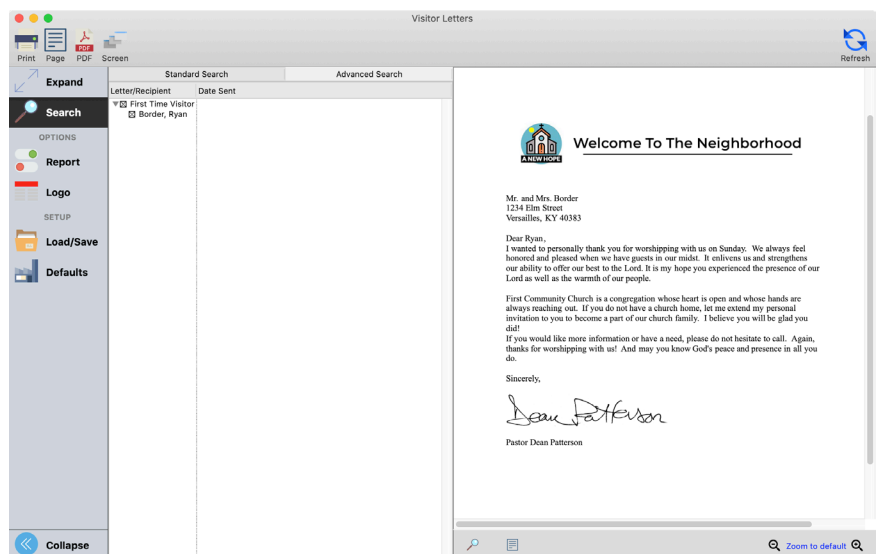
A list of Visitors that attended will display.

For each visitor:

- Select the **Family Visitor Status**
- Choose the letter that you want to send to the Visitor under the **Letter** column
- When all letters are assigned, click **Save**

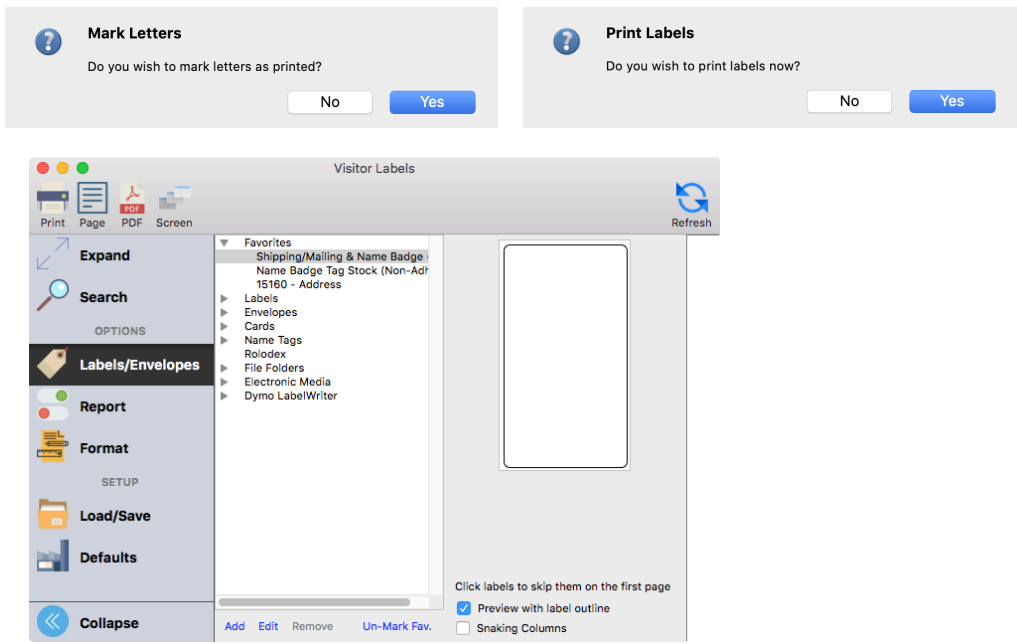
## Print Visitor Letters

- Click the **Print Letters** button.
- Click the **Print** button
- Select the report destination and click OK
- Click Yes or No to messages asking if you want to mark the letters as printed and if you want to print labels (or envelopes) for the letters. (This does not apply if you are previewing the letters.)



**NOTE:** The list of letters that will be printed can be expanded to see to whom the letters are going by clicking the triangle to the left of the check box.

If you click **Yes** to mark letters as printed and to print labels, the Visitor Labels window will open to print labels or envelopes to match the letters.

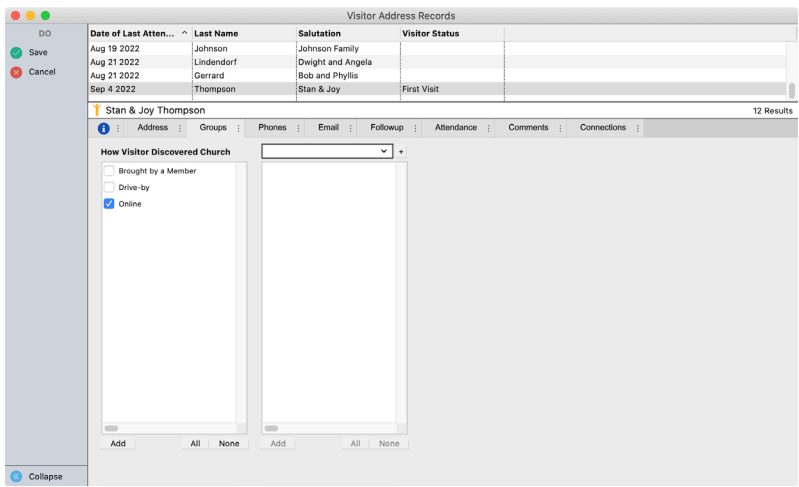


After marking letters as printed, the date the letters were printed will display in the **Sent** column of the Visitor Letter Assignment window.

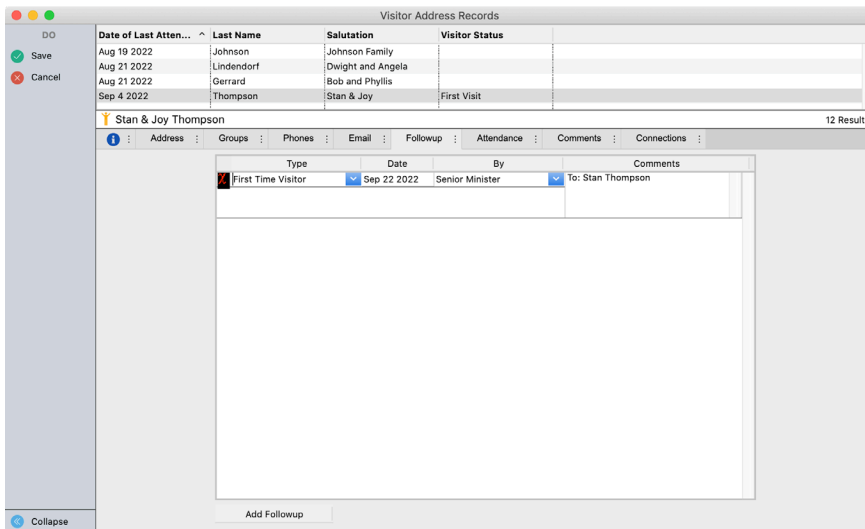
## Demographic Information and Follow-up of Visitors

### ►Program ► Attendance ► Visitor Address Records

The Groups tab on the Visitor Records window allows for an extensive tracking of information on visitors. Created through the Master Coding System, a Code Type entitled "How Visitor Discovered Church" provides valuable outreach information for your leaders. Other Code Types providing additional Visitor information or their interests or needs can be very helpful.



The Follow-up tab tracks letters that are sent from CDM+ through the visitor letters of attendance. Other types of follow-up can also be entered here, such as personal visits, phone calls, class participation, etc.



## Connections

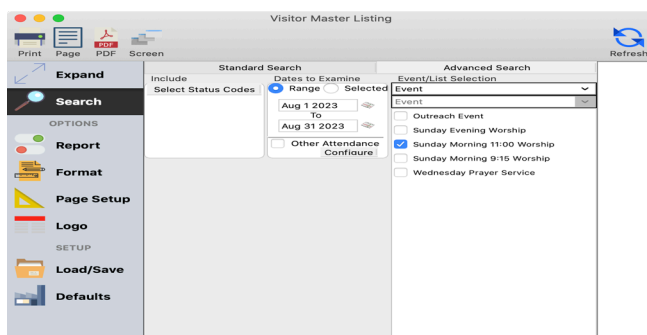
Use the Connections tab on the Visitor Records window to create a connection to the individual or individuals that invited this person to church. That information is an important part of a congregation's or organization's network of relationships.

## Reports and Analysis of Effective Evangelism

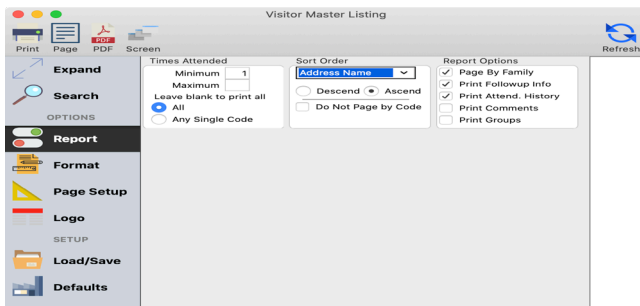
To effectively evaluate the evangelistic performance of the church, detailed record keeping must be done. If that is done, then some dynamic information can be ascertained. The use of the attendance features of CDM+ and demographic information are the two primary sources of information.

## Visitor Master Listing

► Reports ► Attendance Reports ► Listings and Exports ► Visitor Master Listing

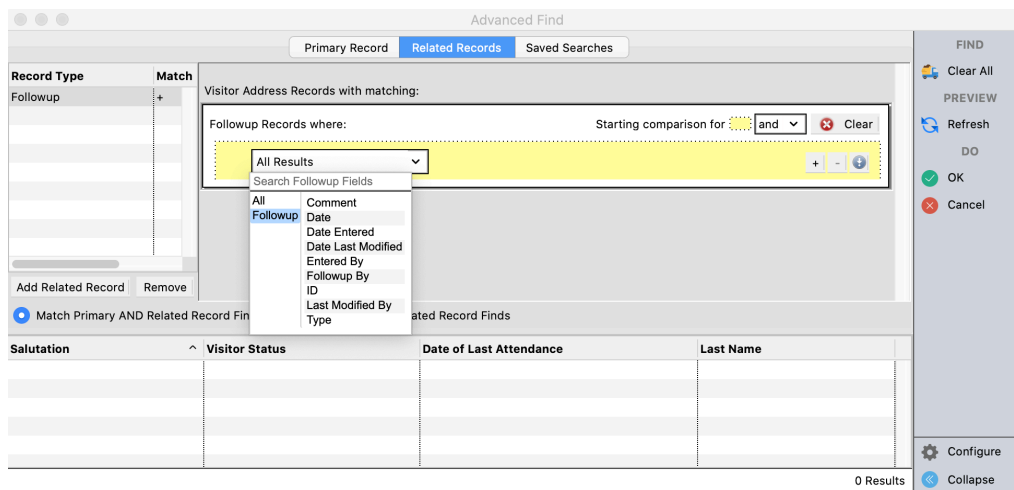


All of the attendance reports can access visitor information. It gives the most information about visitors which can be important to calling teams and those involved in church growth. The Visitor Master Listing report can be run for any date range.



## Measuring effectiveness of visitor follow-ups

Use an advanced find and related records to access the information on the follow-up tab.



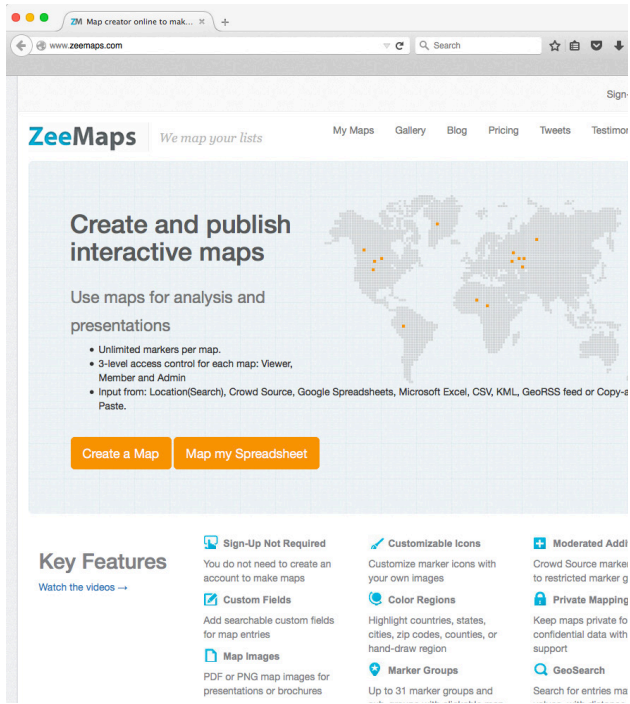
## Analysis of effective evangelism

1. How many visitors in the year?
2. How many attend more than once, in what frequency?
3. How do they find out about the church? What are their interests?
4. How many have moved from being just visitors to a more active role?
5. What small groups do they become involved in or have contact with?
6. Where are the visitors coming from?
7. How many people are involved in interacting with visitors?
8. Do you track feedback that you hear from visitors?
9. Are attendance figures growing?
10. Are the number of visitors growing?

## Tracking where your visitors are coming from

Online services allows you to import lists from CDM+ and create maps. Some examples:

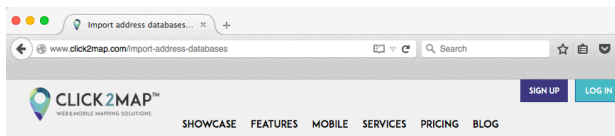
### ZeeMaps - [www.zeemaps.com](http://www.zeemaps.com)



The screenshot shows the ZeeMaps website homepage. The main heading is "Create and publish interactive maps". Below this, it says "Use maps for analysis and presentations". There are two orange buttons: "Create a Map" and "Map my Spreadsheet". A world map with several orange markers is visible in the background. The "Key Features" section lists several capabilities:

- Sign-Up Not Required: You do not need to create an account to make maps.
- Custom Fields: Add searchable custom fields for map entries.
- Map Images: PDF or PNG map images for presentations or brochures.
- Customizable Icons: Customize marker icons with your own images.
- Color Regions: Highlight countries, states, cities, zip codes, counties, or hand-draw region.
- Marker Groups: Up to 31 marker groups and...
- Moderated Add: Crowd Source marker to restricted marker g...
- Private Mapping: Keep maps private for confidential data with support.
- GeoSearch: Search for entries ma...

### Click2Map - [www.click2map.com](http://www.click2map.com)



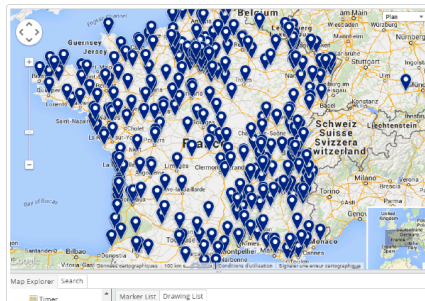
The screenshot shows the Click2Map website homepage. The main heading is "IMPORT ADDRESS DATABASES IN A LARGE SELECTION OF FORM". Below this, it says "Click2Map's powerful import module allows you to import hundreds and even thousands of markers on a r few easy steps. Multiple data formats can be used to import and update marker information: CSV (text/Excel), t GeoRSS and XML." There are two buttons: "SIGN UP" and "LOG IN".

#### IMPORT ADDRESS DATABASES IN A LARGE SELECTION OF FORM

Click2Map's powerful import module allows you to **import hundreds and even thousands of markers on a r few easy steps**. Multiple data formats can be used to import and update marker information: CSV (text/Excel), t GeoRSS and XML.

The import module **auto-detects the most common data fields** based on their header: once properly set up, file can be imported to create new markers or update existing ones with no hassle.

Click2Map **handles a number of default data fields**, but you're free to add you own if you need to: the Perso database module can be extended to handle your very own data an enhance the import module's capabilities.



## Using Membership Records for Visitors

Using a variety of different coding possibilities, CDM+ Membership records can be used for visitor tracking. In doing this, it is imperative that the user periodically review these records to maintain a high level of integrity in the database. To begin, set up a special Mailing Code, designated as "Visitors", on the Address Record. On the Individual Record, use the Membership Code and Membership Status to track the relationship of certain individuals within a prospective family. One of the advantages of using the Membership records for visitors is the easy integration between other parts of CDM+, such as Contributions and Event Registration. Use the Visitation features of CDM+ if tracking visitors through Membership records.

The screenshot shows the 'Address Records' window. At the top, a search bar is set to 'Find records where Mailing Code equal to Visitors'. Below this is a table with columns: Last Name, Salutation Name, Primary Phone, and City. The first row contains 'Doe', 'John and Jane', and 'Big City'. Below the table, the record for 'John and Jane Doe' is displayed. It includes a 'Family Name Information' section with fields for Last Name (Doe), Suffix, Mailing Name (Mr. and Mrs. John Doe), ID (111), Salutation Name (John and Jane), and Label Name (Mr. and Mrs. John Doe). There is also a table for family members with columns: Order, First Name, Last Name, and Family Status. The first row shows 'John Doe Adult' and the second row shows 'Jane Doe Adult'. Below this is the 'Address' section with fields for Address (123 Paved Street), City (Big City), State (KY), Zip (40123), and Mailing Code (Visitors). There are also checkboxes for 'Certified', 'Directory', and 'Newsletter'.

Example of an Address Record using the Mailing Code of Visitor/Prospect.

The screenshot shows the 'Individual Records' window. At the top, a search bar is set to 'Find records where Name equal to John Doe'. Below this is a table with columns: First Name, Individual Last Name, Last Name, Primary Phone, and Salutation Name. The first row contains 'John Doe Doe John and Jane'. Below the table, the record for 'John Doe' is displayed. It includes a 'Membership Code' dropdown set to 'Non-member' and a 'Membership Status' dropdown set to 'Prospective'. There are also fields for 'Church School Class' and 'Church School Status'. Below this are fields for 'Baptism Date', 'Baptism Place', 'Bapt. Church', 'Date Joined the Church', 'Transfer Date', 'Transfer Place', 'Tran. Church', 'Transferred out of Church on', 'Dedication Date', and 'Dedication Place'.

Example of Individual Record using the Membership Code and Membership Status field to indicate Visitor/Prospect.