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.

•	• •				Visito	r Addres	s Records					
	SHOW	Date of Last Atten	` Last Name	Sal	lutation	Vi	sitor Status					
*	All	Aug 19 2022	Johnson	Joh	Johnson Family							
		Aug 21 2022	Lindendorf		ight and Angela							
Ø		Aug 21 2022	Gerrard		b and Phyllis							
\mathcal{P}	Find	Sep 4 2022	Thompson	Sta	Stan & Joy F		st Visit					
Q	Searches	🍟 Johnson Family J	ohnson		· · ·							12 Results
	Grid	1 : Address :	Groups :	Phones :	Email :	Followup	: Attend	ance <u>:</u> Co	mments : Con	nections ;		
-	Reports											
	DO											
+	Add											
£		F	amily Name Inforn	nation							_	
6			Last Name: J		Suffi	c	Order	First Name George	Last Name Johnson	Family Status Head of Household	~	
1	Change		Mailing Name: M			ID: 6	■ ▼ λ ▲ ₹ χ	Ann	Johnson		<u> </u>	
Т	Delete	s	alutation Name: J					Janet	Johnson			
C	Transfer		Label Name: T	'he Johnson Fa	amily						-	
						Primary Ad	dross Alt	ernate Address				
			• data a sec	698 Persimmo				ernate Address	Visitor Status			
			Address:	698 Persimmo	on Tree Rd						\sim	
			City:	Big City		State K	7 Zip 40	123				
			Country:				Carrier S	Sort:	Directory	Newsletter		
								MapQuest 🖣	Directory			
-												
•	Configure											
	Collapse											

▶ 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.

😑 🕒	Event At	tendance Entry		
lisplay				
Event		Attendance Date		
Sunday Morning 11:00 Worship	~	Aug 27 2023 🗸 🔍		
Individuals Visit	tors	Those Present		
Advanced Find	Show All	😵 🔀 Border, Ann 😵 🎗 Border, Jacob		
		S Border, Kelly		
Johnson, Janet		Border, Ryan		
Lindendorf, Angela Lindendorf, Dwight		🚱 🐯 Johnson, Ann		
Lindendorf, Philip		🚱 😨 Johnson, George		
Mendin, Sasha		😵 🕄 Johnson, Janet		
Mendin, Toby				
Norrison, Andy				
Rollins, Stanley				
Rollins, Stanley Stenson, Jan				
Rollins, Stanley Stenson, Jan Thompson, Joy				
Rollins, Stanley Stenson, Jan Thompson, Joy Thompson, Stan				
			Total Attendee:	s: 7
Rollins, Stanley Stenson, Jan Thompson, Joy Thompson, Stan	Mark Selected	Show Existing	Total Attendee:	s: 7 Clear Selected
Rollins, Stanley Stenson, Jan Thompson, Joy Thompson, Stan Xavier, Meredith Add New Visitor ndividual Information	Mark Selected	Show Existing	Total Attendee Present List Ke	Clear Selected
Rollins, Stanley Stenson, Jan Thompson, Stan Xavier, Meredith Add New Visitor Idividual Information Address: Meredith Xavier	Mark Selected		Present List Ke	Clear Selected
Rollins, Stanley Stenson, Jan Thompson, Joy Thompson, Stan Xavier, Meredith Add New Visitor dividual Information Address: Meredith Xavier 102 Evergreen St	Pho	ne:	Present List Ke	Clear Selected ey ttendance
Rollins, Stanley Stenson, Jan Thompson, Stan Xavier, Meredith Add New Visitor Idividual Information Address: Meredith Xavier	Pho		Present List Ke	Clear Selected
Rollins, Stanley Stenson, Jan Thompson, Joy Thompson, Stan Xavier, Meredith Add New Visitor adividual Information Address: Meredith Xavier 102 Evergreen St	Pho	ne: us: Head of Household	Present List Ke	Clear Selected ey ttendance
Rollins, Stanley Stenson, Jan Thompson, Joy Thompson, Stan Xavier, Meredith Add New Visitor adividual Information Address: Meredith Xavier 102 Evergreen St	Pho Family Stat	ne: us: Head of Household	Present List Ke	Clear Selected ey ttendance

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

• • •		Visitor Letter	Assignment				
Showing Visitors for Su	unday Morning 11:00 Worsh	ip on Aug 27 2023			A 1	69	
Name	Family Visitor Status	Letter	Sent	F	Print Letters	Letter Setup	
Johnson, Ann	~	No Letter Assigned 🗸			-		
Johnson, George	~	No Letter Assigned 🗸		Attenda	nce Date: Au	g 27 2023 🗸	
Johnson, Janet	~	No Letter Assigned 🗸		Event	Event	~	
Border, Ann	~	No Letter Assigned 🗸		Class	Outreach Eve		
Border, Jacob	~	No Letter Assigned 🗸		🗌 List	Sunday Even		
Border, Kelly	~	No Letter Assigned 🗸		Any	Sunday Morning 11:00 Worsh Sunday Morning 9:15 Worshi		
Border, Ryan	~	No Letter Assigned 🗸				Prayer Service	
					ual Information ress: Mr. and Mrs. Border Border 1234 Elm Street Versailles, KY 40383		
				Past Letter	^{S:} Date	Letter	
					Cancel	Save	

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

Create Visitor Letters

•		Visitor Letter Setup		
E 👗 🚛				
Page PDF Screen			Refresh	
Expand	r: First Time	Visitor	Select/Add	
Bod	y:			
Search				
OPTIONS				
Notice		A		
		Welcome To The Neighbor	nood	
Report				
	Visit	or Address Label Name or Address Address Black		
Format				
	Dear	Water Individual/First Name. sted to personally thank you for worshipping with soom Sunday. We a red and pleased when we have goests in our midel. It enlivers us and	lways first	
Page Setup	hone	eed and pleased when we have guests in our midst. It entirens us and billin to offer our best to the Lord. It is not have non-convertineed then	kengdons roomer ef ear	
		Select Visitor Letter	Cotup	
	-	Select visitor Letter	Setup	
🗕 Ei 💞			Qr Search	
Add Duplicate Renam	P. Delete			
Categories (Drag notice to		Notices		
Description	Count	Description ^ V M O	Body View Access Modify Access Info	
	Lount			
<all></all>	1	First Time Visitor		
<no category=""></no>	0			
Attendance Letters Birthday	0			
Birthday Board	0			
Choir	0		Welcome To The Neighborhood	
Elders	0		Charles and the second s	
Festival Letters	0			
Festivals	0		Visitor Address Label Name Visitor Address Address Block	
Life Events	0		Dear Weitter Individual First Name.	
	0		Low memory memory and the set of	
Members				
Members Templates			Lord as well as the solution or our people.	
Templates	0		Lord as well as the solution or our people.	
Templates Vacation Bible School Let			Later as non-an one southern or our people. First Community Church is a compregation where heart is open and where hands are always making out. If you do nethers a drucch home, it mo extend my personal institutes to post to become a part of our chards family. Thelieve post will be glad you diffe	
Templates	0		Loted as well as the same of our people. First Community Church is a surgregation whose heart is spen and whose hands are above maching out. If you do not here a clubb frame, for me extend invision to you to become a part of our clubb family. I believe you will be glad you	
Templates Vacation Bible School Let	0		Later as non-an one southern or our people. First Community Church is a compregation where heart is open and where hands are always making out. If you do nethers a drucch home, it mo extend my personal institutes to post to become a part of our chards family. Thelieve post will be glad you diffe	
Templates Vacation Bible School Let	0		Lot as to a not-source of the second second source of the second	
Templates Vacation Bible School Let	0		Lot at a set, in two lowests or early topper. Four Community, then it is a comparison where heart is open and where heads and always studing and. If type do not have a shorth heart, it is no earlier any person invariants to prove the lowest as part of our down's heads. The low person is the lowest distances in the constraints of the set of the lowest and figures would filter near influenciation or there a samely plane do not excludence in efficient figures would filter near influenciation or there a samely plane do not excludence in efficient figures and an exceeding and with and many worknew Gold papers and preserve in all your do.	
Templates Vacation Bible School Let	0		Lot as to a not-source of the second second source of the second	
Templates Vacation Bible School Let	0		Los es a la decisión de adaption de la decisión decisión de la decisión decisión de la decisión decisión decisión decisión decisión de la decisión dec	
Templates Vacation Bible School Let	0		Los es a la decisión de adaption de la decisión decisión de la decisión decisión de la decisión decisión decisión decisión decisión de la decisión dec	
Templates Vacation Bible School Let	0		Los es a la decisión de adaption de la decisión decisión de la decisión decisión de la decisión decisión decisión decisión decisión de la decisión dec	
Templates Vacation Bible School Let	0		Los es a la decisión de adaption de la decisión decisión de la decisión decisión de la decisión decisión decisión decisión decisión de la decisión dec	
Templates Vacation Bible School Let	0		Los es a la decisión de adaption de la decisión decisión de la decisión decisión de la decisión decisión decisión decisión decisión de la decisión dec	
Templates Vacation Bible School Let	0		Los es a la decisión de adaption de la decisión decisión de la decisión decisión de la decisión decisión decisión decisión decisión de la decisión dec	
Templates Vacation Bible School Let	0	Restriction: (7)/w Mosfly	Los esta alta alta desente alta	

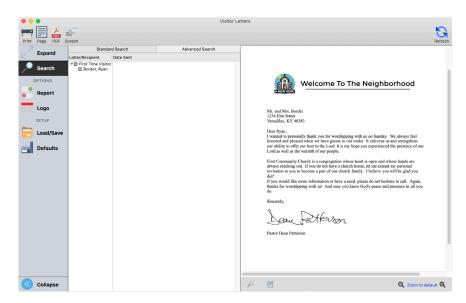
A list of Visitors that attended will display.

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.

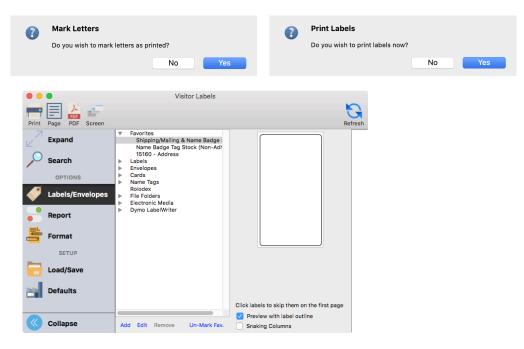
- Go to the Notice tab.

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.

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.

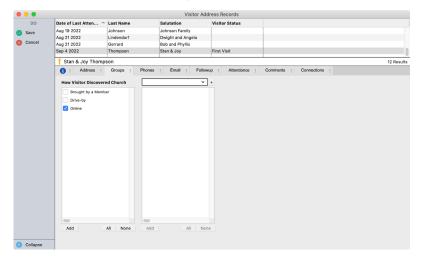


After marking letters as printed, the date the letters were printed will display in the **Sent** column of the Visitor Letter Assignment window.

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.

•••			Visitor A	ddress Records						
DO	Date of Last Atten	Last Name	Salutation	Visitor Status						
🚫 Save	Aug 19 2022	Johnson	Johnson Family							
-	Aug 21 2022	Lindendorf	Dwight and Angela							
🚫 Cancel	Aug 21 2022	Gerrard	Bob and Phyllis							
	Sep 4 2022	Thompson	Stan & Joy	First Visit						
	Y Stan & Joy Thompson 12									
	1 : Address :	Groups : Phone	s : Email : Folle	owup : Attendance :	Comments : Connections :					
		Туре	Date	By	Comments					
		First Time Visitor	Y Sep 22 2022	Senior Minister	To: Stan Thompson					
	_	Add Followup								
Collapse										

Connections

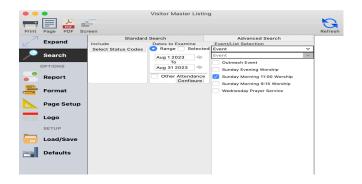
Use the Connections tab on the Visitor Records window to create a connection to the individual or individuals that invited this person to church. That information is an important part of a congregation's or organization's network of relationships.

Reports and Analysis of Effective Evangelism

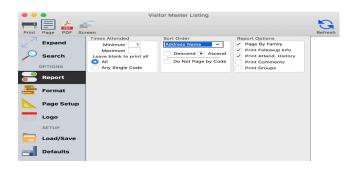
To effectively evaluate the evangelistic performance of the church, detailed record keeping must be done. If that is done, then some dynamic information can be ascertained. The use of the attendance features of CDM+ and demographic information are the two primary sources of information.

Visitor Master Listing





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.

					Advand	ed Find				
				Primary Record	Related Records	Saved Searches				FIND
Record Type Followup	Match +	Visitor A	ddress Re	ecords with matchin	ıg:					Clear All PREVIEW
		Followu	ıp Record	s where:		Start	ing comparison for 🚞 and	👻 🕄 Clear	G	Refresh
			All Resu Search F	lts ollowup Fields	~			+ - 0		DO OK
Add Related Record Match Primary AN	Remove ND Related F		All Followup	Comment Date Date Entered Date Last Modified Entered By Followup By ID Last Modified By Type	ated Record Finds				8	Cancel
Salutation	^	Visitor	Status		Date of Last Att	endance	Last Name			
									\$	Configure
								0 Results		Collapse

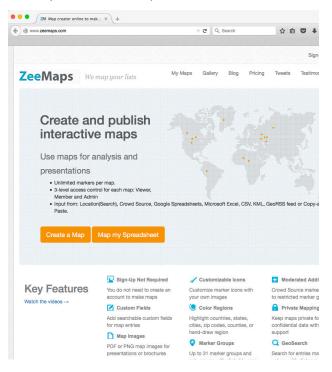
Analysis of effective evangelism

- 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?

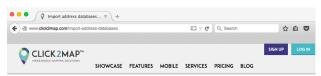
Tracking where your visitors are coming from

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

ZeeMaps - www.zeemaps.com



Click2Map - www.click2map.com

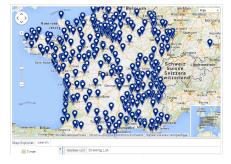


IMPORT ADDRESS DATABASES IN A LARGE SELECTION OF FORM

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), H 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 Person 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.

SHOW	Find records where Mailing Code	✓ equal to	✓ Visitors		- Find	Advanced Find
All	Last Name	^ Salutation Name	Primary Phone	City		
None	Doe	John and Jane	T Timur y T none	Big City		
Find						
Searches						
Grid	John and Jane Doe			I		1 Re:
Reports		hones : Email : User Fields :	Photos : Pastoral	Groups Connec	tions ; Giving	
DO					diving .	01110 :
Add						
Multi-Add	Family Name Info	rmation	Order First Name	Last Name Fa	amily Status	
Change	Last Name:			Doe Adult	~	
		Mr. and Mrs. John Doe ID: 111	 ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	Doe Adult	~	
Delete	Salutation Name:					
GO	Label Name:	Mr. and Mrs. John Doe				
Individual		Primary Add	dress Alternate Address			
	Address	: 123 Paved Street		Mailing Cod		
				Visitors	~	
				Care Group Group Test	> ~	
	City	r: Big City State KY	Zip 40123	Group rest	•	
	Country		Carrier Sort:	Directory	Newsletter	
		Certified	MapQuest 🚡	Directory	Hensietter	
Configure						

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

•••				Indiv	idual Records	
DO	First Name	Individual Last .	Last Name	Primary Phone	Salutation Name	9
📀 Save	John	Doe	Doe		John and Jane	
🚫 Cancel	Jane	Doe	Doe		John and Jane	
ouncer						
	😂 John D	oe				2 Result
	(()	; Name ;	Phones ;	Email ; Personal	; Membership	Groups ; Photos ; User Fields ; Attendance ; P ;
			Memb	pership Code: Non-me	ember	✓ Asterisk
			Membe	ership Status: Prospec	ctive	×
		-	Church	School Class:		Church School Status:
			1	Baptism Date: /	/ ~	Baptism Place:
						Date Joined the Church: / / /
			т	ransfer Date: /	1 🛶	Transfer Place:
					Tran. Church:	
					1	Transferred out of Church on: / / /
			Dedica	tion Date: /	/ 🥪 🛛	Dedication Place:

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