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.

▶ **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
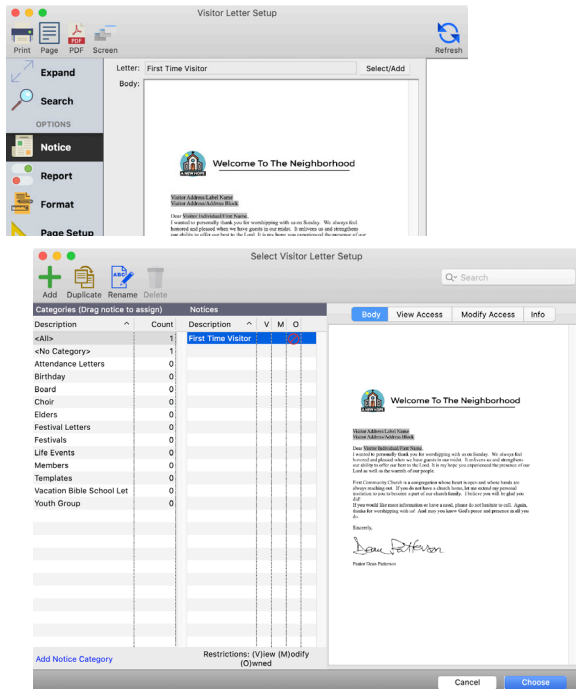
- Go to the Notice tab.

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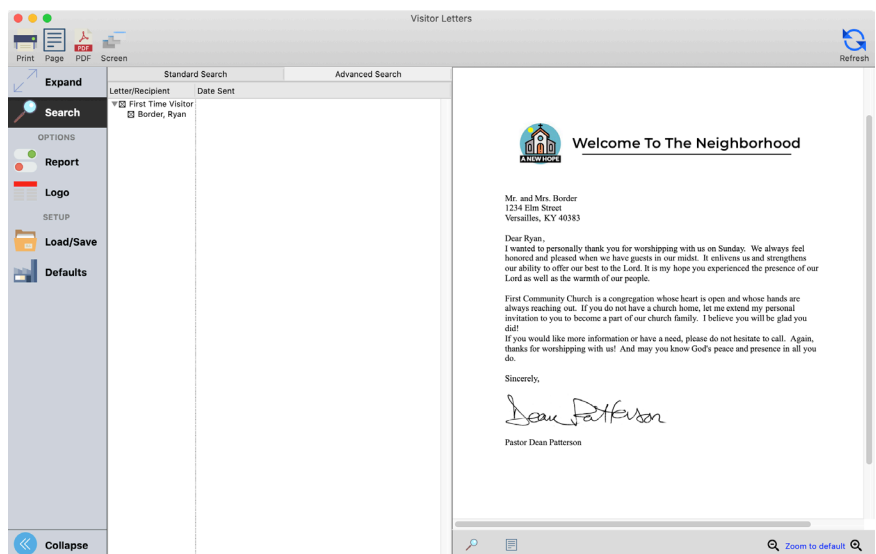
NOTE: The list of letters that will be printed can be expanded to see to whom the letters are going by clicking the triangle to the left of the check box.

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.
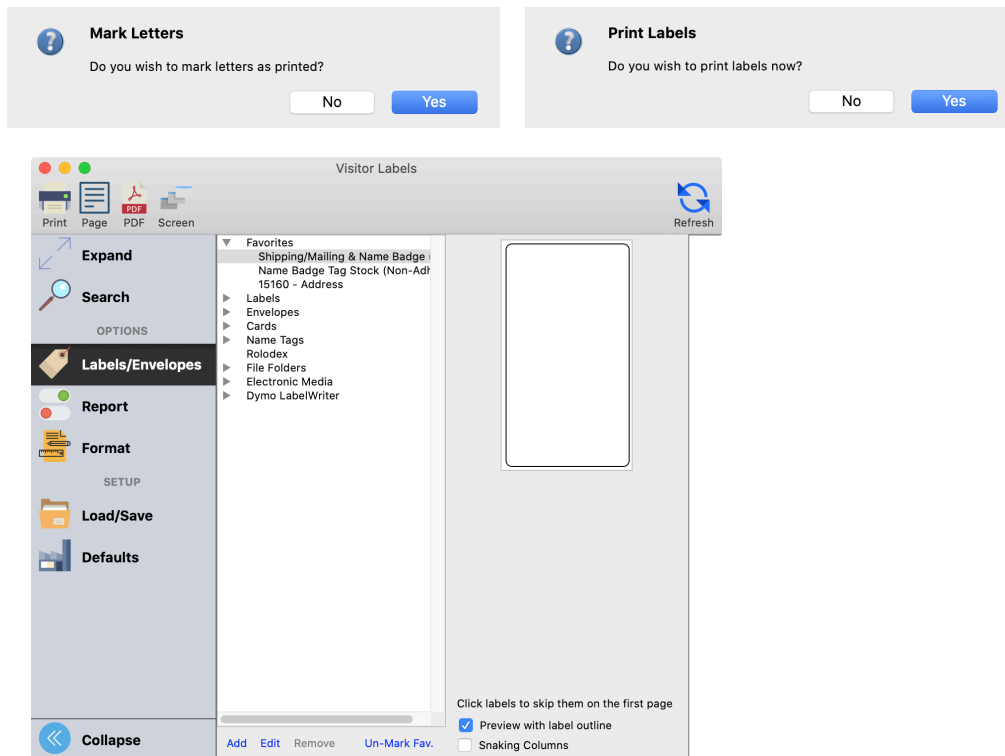

After marking letters as printed, the date the letters were printed will display in the **Sent** column of the Visitor Letter Assignment window.

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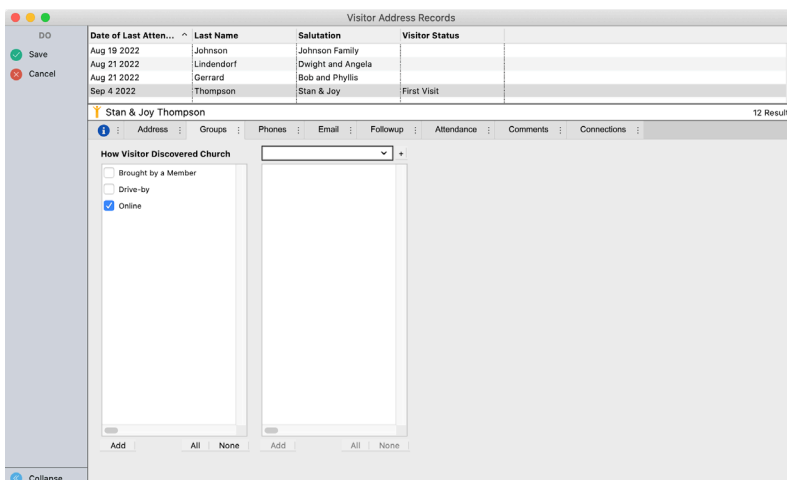
The Follow-up tab tracks letters that are sent from CDM+ through the visitor letters of attendance. Other types of follow-up can also be entered here, such as personal visits, phone calls, class participation, etc.
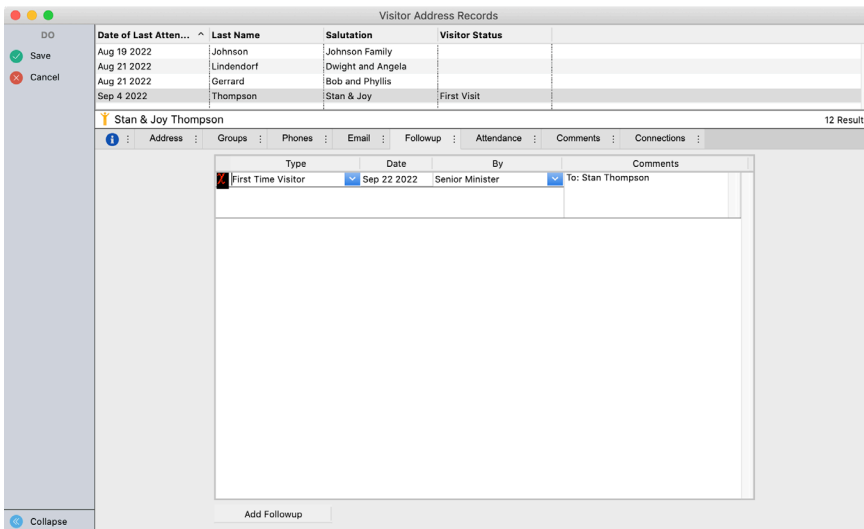
Connections

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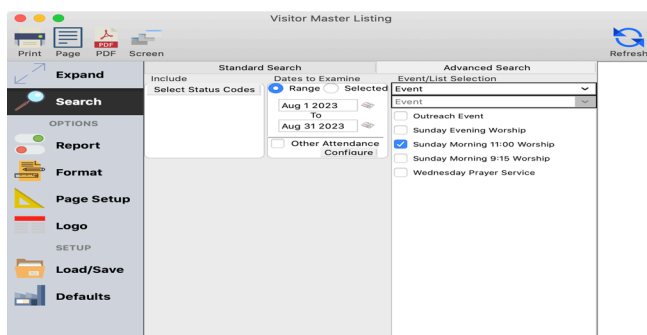
All of the attendance reports can access visitor information. It gives the most information about visitors which can be important to calling teams and those involved in church growth. The Visitor Master Listing report can be run for any date range.
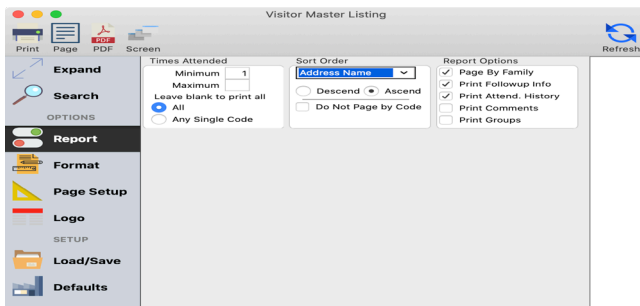
Measuring effectiveness of visitor follow-ups

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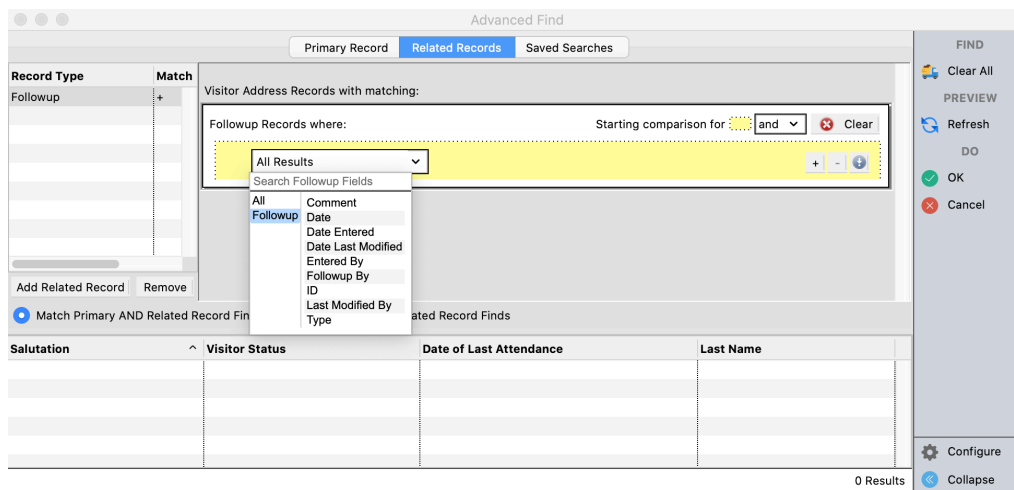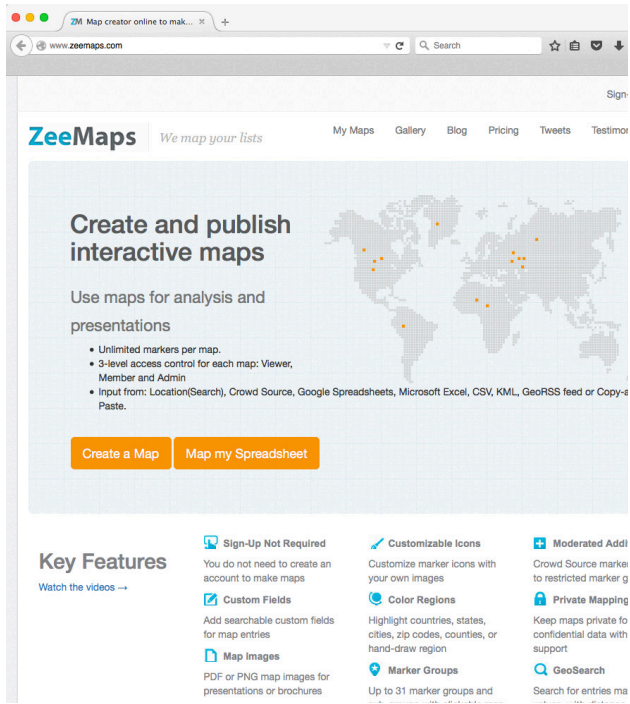
Analysis of effective evangelism

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

Click2Map - www.click2map.com

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.

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

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