

A PLANNING WORKSHEET FOR CHURCH TEAMS

Church connection card planning kit

Plan a short connection card. Prepare a clear response for each request.

FOR Church staff, pastors, welcome teams, and ministry leaders

INSIDE THE KIT

- Choose one purpose. Choose only the fields that you need.
- Plan how people will use the print or digital card.
- Assign each response and review task.

ABOUT ENGAGE SPOT

Engage Spot helps churches increase engagement, communicate consistently, and do more ministry without adding more manual work.

Plan the card

Keep the card short. Choose one purpose. Ask only for the information that your church needs.

Who is this card for? New guests, regular attenders, or another group

What is its one main purpose?

What can someone ask for or do? Use current, specific choices such as baptism, groups, serving, prayer, or speaking with a pastor.

Which contact information does your church need?

☐ Name ☐ Email ☐ Mobile number ☐ Preferred contact method ☐ Other: _____

FIELD DECISIONS

How will your church use this answer?

If no one can give a clear answer, remove the field.

Proposed field	Required	Optional	Unnecessary
1.	☐	☐	☐
2.	☐	☐	☐
3.	☐	☐	☐
4.	☐	☐	☐

Format

☐ Print ☐ Digital ☐ Both

Where will people find it?

Where will people find and return the printed card?

Where will people find the digital card?

Short church-owned URL and QR-code destination The QR code must open the form. Test the QR code and URL after you print the card.

Prepare the response

Prepare the response process before people use the card. Assign an owner to each response.

Preferred contact method Select one.

☐ Email ☐ Text message ☐ Phone call

Would you like to receive church news and updates from [Church Name]? Select all that apply.

☐ Send me email updates ☐ Send me text updates

Confirmation wording State who will review the message. State a response time that your team can meet.

ROUTING PLAN

Who receives each request?

Give each response to the person responsible for the next action.

Request type	Primary owner	Backup or next action
First-time guest		
Prayer or pastoral care		
Baptism, group, or serving		
Other: _____		

How quickly can the church reasonably respond?

Who can access sensitive prayer or pastoral information?

How will your team find and review unanswered responses? Name the owner. Set a review schedule. Set the next action for a late response.

FINAL READINESS

Test the complete path

Reviewer: _____ Date: _____

☐ The purpose is clear. The request choices are current.	☐ Required, optional, and unnecessary fields are clear.
☐ The card explains how the church will use the information and links to the church privacy policy.	☐ The short URL and QR code open the correct form.
☐ Submit a test response from a phone. Make sure the form is easy to read and use, and confirm that the success message appears.	☐ A test response goes to the assigned person.
☐ Confirmation and response-time promises match the process.	☐ An assigned person will review unanswered responses and process changes.