A PRACTICAL KIT FOR CHURCH TEAMS

Church visitor follow-up kit

Respond with care, assign each next step, and prevent missed or excessive contact.

FOR **Pastors, church administrators, connections leaders, and trained volunteers**

INSIDE THE KIT

- Plan how your team will follow up.
- Adapt email, text, and call responses.
- Assign handoffs and review the process.

ABOUT ENGAGE SPOT

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

Plan the first response

Know how each person connected and who will follow up.

Intake points Select all that apply.

- ☐ Connection card
- ☐ Website form
- ☐ Email
- ☐ Text
- ☐ Phone
- ☐ In person
- ☐ Other: __________

ROUTING PLAN

Give each connection a clear path

Name the owner and the next action before people connect. Use the contact method that each person selects.

Reason for connecting	Owner	Backup / next action
General question		
Prayer or pastoral care		
Group / baptism / serving		
Event information		
Other: ______________		

Stated response time

____

Person who checks for new connections

____

Backup person

____

Where completion is recorded

____

FIRST-RESPONSE CHECK

Check the message before you send it

- ☐ I understand why the person connected.
- ☐ I am using the contact method that the person selected.
- ☐ I identify myself and the church.
- ☐ I address the reason for connecting before I give an invitation.
- ☐ I give one relevant next step, if it is useful.
- ☐ I remove sensitive details that are not necessary.

Adapt the response

Use what the person shared and the selected contact method. Edit each template before you send it.

Email template

EDIT BEFORE USE

Subject: Thank you for connecting with [Church Name]

Hello [Name],
Thank you for connecting with [Church Name]. You asked about [question, prayer need, or next step].

[Give the direct answer or state the action that you will take.]

If useful, your next step is [one relevant next step]. You can reply if you have a question or if you do not want us to contact you again.

[Your Name] · [Role or team]

Text template

EDIT BEFORE USE

Hello [Name], this is [Your Name] from [Church Name]. You asked about [question, prayer need, or next step]. [Give the answer or next action.] Reply if you have a question or want us to stop.

Call opening

EDIT BEFORE USE

Hello [Name], this is [Your Name] from [Church Name]. You asked us to contact you about [question, prayer need, or next step]. Is this a suitable time for a short call?

Call close

EDIT BEFORE USE

Before we finish, did we address what you needed? The agreed next action is [action] by [person/date].

Voicemail template

EDIT BEFORE USE

Hello [Name], this is [Your Name] from [Church Name]. Thank you for connecting with us. You asked us to call, so I wanted to follow up with you today. If you would like to talk, you can call me at [number] or email me at [address]. Have a great day.

MESSAGE CHECK

Keep each response clear and useful

☐ **The name, church, and sender are correct.**	☐ **The message responds to the reason that the person connected.**
☐ **The contact method matches the plan.**	☐ **There is no unnecessary invitation or extra message.**
☐ **Private details are not in the message.**	☐ **The next action and owner are clear.**

EngageSpot

Assign and complete each handoff

Use one owner for each action. Record enough information to complete the follow-up.

OPERATIONAL TRACKER

Track the agreed action

Use a follow-up ID or initials instead of unnecessary personal details.

Follow-up ID or initials	Reason for connecting	Owner	Due date	Action needed	Status	Completed date
1.						
2.						
3.						
4.						
5.						
6.						

HANDOFF RULES

Make responsibility clear

One owner	Only needed information	Backup owner	Complete after action	No assumptions
Assign one person to the current action.	Share only what the owner needs.	Use the named backup when the owner cannot act.	Mark complete after the agreed action is done.	Record what the person asked. Do not add assumptions.

Sensitive details belong in the church's approved private system.

Tracker owner

Backup owner

How will the team find overdue or incomplete actions?

Review the process

Review completed follow-up. Find gaps, correct the process, and record the next review.

From	To

Review owner

PROCESS REVIEW

Check the work and record needed action

Review item	Yes	No	Action needed
Each person who asked for follow-up received it.	☐	☐	
Each response addressed the reason that the person connected.	☐	☐	
The team used the selected contact method.	☐	☐	
Only authorized people received sensitive follow-up information.	☐	☐	
No follow-up was late, lost, or duplicated.	☐	☐	
No visitor received unexpected or excessive contact.	☐	☐	
The team stopped contact when a person asked.	☐	☐	
The owners, links, and templates are current.	☐	☐	

IMPROVEMENT PLAN

Assign each correction

Problem	Action	Owner	Due

Next review