

Automate Holiday Visitor Follow Up



Forms

- Create a Digital Visitor Form**
 - In our Giving, People, and Website modules, you have a robust **Form Builder** at your disposal. Use this to create a Digital Visitor Form for guests to complete. This helps you to collect their information so you can follow up with them.

- Include the Following Key Elements in Your Form**
 - Basic Contact Information: This would include Name, Phone Number, and Email Address.
 - Interest Checkboxes: Allow guests to check which areas of your ministry they may be interested in so you can assign the appropriate staff member or lay leader to follow up with them.
 - Prayer Requests: Add a personal touch by asking how you can pray for each guest using a text box.

Pro Tip: Be ready to share your form with your visitors by having your form's unique **QR code** visible during holiday celebrations. You can also claim a **Text Giving Number** and create a **Form Keyword** for your form so people can easily have the form sent directly to their phones!

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- Create a Workflow**
 - **Workflows** help you automate follow-up tasks and reminders, so no one falls through the cracks

- Add a Form Submission Trigger**
 - Select the Digital Visitor Form you created.

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- Select the Groups Action**
 - Choose a **Group** you have created for Visitors to automatically add them upon completing the Digital Visitor Form.

- Add Another Form Submission Trigger**
 - Select the Digital Visitor Form you created.

- Select the Interactions Action**
 - **Interactions** are a log of your connections with a person in your database. Your workflows can assign Interactions to your staff or volunteers so that guests will receive an even more personalized follow-up experience.

Pro Tip: You can even log and manage these Interactions from our [Mobile App!](#)

- Don't Forget to Save Your Workflow**