



Visitor follow up review

Trace one request from the connection card to a clear response. Use this at your next welcome-team meeting with the tools your church already has.

Use a fictional example here. Keep visitor contact details and personal or pastoral notes in your church's appropriate records, not on this shared sheet.

Church or team:

Review date:

1 Choose one useful response

Try: a guest asks about joining a small group. Decide what help they should receive.

Request type:

Useful next action:

- ☐ The card asks only for information needed for that action.
- ☐ The visitor can choose whether to receive a reply and by which channel.
- ☐ We check permission for that channel before making contact.

2 Make the handoff visible

Who checks new requests:

Who covers absence:

Role owning the next action:

Action due by:

Where the task and status are recorded:

- ☐ The owner knows what to do and when it is due.
- ☐ Sensitive conversations have a private route to the right person.

3 Agree how to close the loop

What shows a response or appropriate resolution happened:

Who checks unfinished work:

Next review date:

After the next service, review real requests in your church's records. Count responses separately from new memberships.

One change before the next service:

Using TheFaithApp

Visitor Inbox supports a follow-up owner, task, due date and contact-permission review. Forms responses have their own owner and due date. Agree which workspace receives this request and test the handoff.