Instructions for Visitor Tracking for Upcoming Marketing Campaign

Tracking the numbers of visitors and returning visitors is a good membership practice. By knowing who is visiting and what their interests are, you can minister to their needs. It’s also a critical part of measuring the effectiveness of your outreach efforts, and the success of the upcoming regional marketing campaign. To get baseline information it’s important to begin your tracking efforts now, and it is vitally important to have a clear, consistent system in place for doing so. The intention of this packet is to provide a step by step method for tracking and compiling visitor data.

Materials –
- Guest Form – used to get information from the visitors
- Returning Visitors Sign-in Sheet – used to keep tabs on returning visitors
- Guest Log – used to keep information clearly organized and for easier reporting
- Online Survey – used to report visitor tracking weekly

Step 1 -- Keep an Eye Out

- Put a Visitors table staffed by someone with a friendly face near the door.
- If you have greeters, have them look for people who may be new in order to direct them to the table.
- Have a separate table, or a separate area at your welcome table, with a sign-in sheet for returning visitors. These are guests who have visited at least once before, but who are not yet members of the church. They may have visited anywhere between a couple of times and regularly for months.

Step 2—Gather Information

- Ask each first time guest to fill out a Guest Form. It is easiest to put several of these on clip boards with pens attached so that people do not need to wait in line.
- Collect returning visitors’ names on the Returning Visitor Sign-in Sheet. Use a new sheet each week, with the date at the top, for the sake of clarity.
- It is important to remember that tracking visitors need not happen only before the worship service. Keep some guest forms on hand during coffee hour as well in order to record people you may have missed. If you recognize a returning visitor who didn’t sign in, go ahead and write his or her name on the sign-in sheet.
- We recommend keeping these guest forms and returning visitor sign-in sheets organized by week for reporting purposes.

Step 3—Record Information

- Each week, input the information from the Guest Forms into the provided Guest Log spread-sheet, either on paper or in the compute.
- Write in each guest’s name, contact information, and date of first visit.
• Each week, you should also enter the information from your returning visitor sign-in sheet into the guest log. For each returning visitor, find his or her name on the log from their first visit and enter the dates of any subsequent visits in the “Subsequent Visits” column, separated by a comma. This way you can look back after several months to see how many visitors have been returning. This is important information for you. If a visitor is returning on a regular basis, it is time to get them involved in the life of the church. We will be asking you for this information a later on in the reporting process.

• If you see a name on your Returning Visitor Sign-In Sheet that you cannot find already on your Guest Log, please disregard that name for reporting purposes. This situation may indicate that this particular returning visitor visited for the first time before we began tracking, and including her or him in the guest log could skew our numbers. You may wish to keep information on this person for welcoming purposes, but please keep that information separate to insure the integrity of our tracking numbers.

**Step 4— Report Visitor Form Information Weekly**

• Each week, enter the information from the Visitor Forms into the online survey that we link from the regional website as well as in an e-mail to you.

• For your reference this is the web-address of the survey:
  

• The information we will need is:
  
  o Number of adult, local, first-time visitors
  o Number of visitors who report finding your congregation through each of various different means, including newspapers, billboards, internet advertising, etc.

• We are concerned with local visitors rather than out-of-town visitors because we are looking to track the effectiveness of our local advertising efforts.

**Step 5—Three-Month Returning Visitor Check-in**

• Ninety days after you begin reporting, you will be asked to give us some numbers regarding returning visitors. We will then continue to collect these numbers on a monthly basis.

• After ninety days we will send you a survey each month asking for the following information:
  
  o How many first-time visitors did you have in the month of _____?
  o Since then, how many of those visitors have returned?

• You will be able to easily answer these questions by referring to your guest log. You should be able to see at a glance how many visitors are listed with their first visit in the month about which we are asking, and then you will simply look to the ‘subsequent visits’ column to see whether there are any dates listed.

If you have questions, please contact Molly Housh at mhoush@uua.org (through May 2009) or Valerie Holton at vholton@uua.org (anytime).