Ministry Brands®

Interactions Checklist:

Guest Follow-Up

Create a digital connection card that is quick and easy for guests to complete - then let automated workflows/interactions (email, text or phone call) trigger follow-ups to ensure that they feel welcomed and provide options for ways to connect.

- ☐ Set up Interactions
  - o [Add Custom Interaction Types](#)
  - o [Enable Interaction Permissions](#)

- ☐ Create a New Guest Form
  - o [Step-by-Step Form Builder Guide](#)
  - o [Sample Guest Form (1)](#)
  - o [Sample Guest Form (2)](#)

- ☐ [Create a New Guest Follow-Up Workflow](#)
  - o Add person to a Group
  - o Assign an Interaction
  - o Send Text Message

- ☐ [Automate Your Visitor and Follow Up Process](#)

- ☐ [Manually Create or Log an Interaction](#)
  - o Navigate to Interactions on the Left-Hand Menu
  - o Assign an Interaction
  - o [Log an Interaction](#)

- ☐ [Volunteer/Staff Action](#)
  - o Edit an Interaction
  - o Log an Interaction

- ☐ [Manage Interactions](#)
  - o Filter Outstanding and Completed Interactions
  - o Edit an Interaction