

Managing Prospect Information

Written by Pastor Jonathan Schroeder

An efficient tool for managing prospect data is a requirement for faithful follow-up. You need a method to keep track of their information and track any visits, calls, or contact that your congregation has with your prospects. In the business world, this genre of software is called Customer Relationship Management (CRM). The difference, of course, is that in the Church, we are not tracking potential customers, but prospective souls for the kingdom.

Any prospect management solution will need to carry out three basic functions:

- Track prospect data in an efficient manner
- Retain prospect data and enable easy access to the data either on screen or in reports
- Track calls, meetings and comments about the prospect to aid future follow-up

This article has suggestions for you to consider as solutions to manage this data. You could use any of the three options—your final choice will be determined by what kind of functions you need, your budget, and your software environment.

Three Suggestions for Managing Prospect Information

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Prospect Management — Old, tried and true. Here is a database developed by Pastor Jonathan Schroeder called Prospect Management. It has been used by hundreds of our congregations for more than a decade. Free for download, it comes with extensive documentation but no other technical support. Fully customizable, open source. Requires Microsoft Access. ([You can purchase Microsoft Access HERE.](#))

[Download Prospect Management by clicking HERE.](#)

Get the extensive documentation, [which can be found HERE.](#)

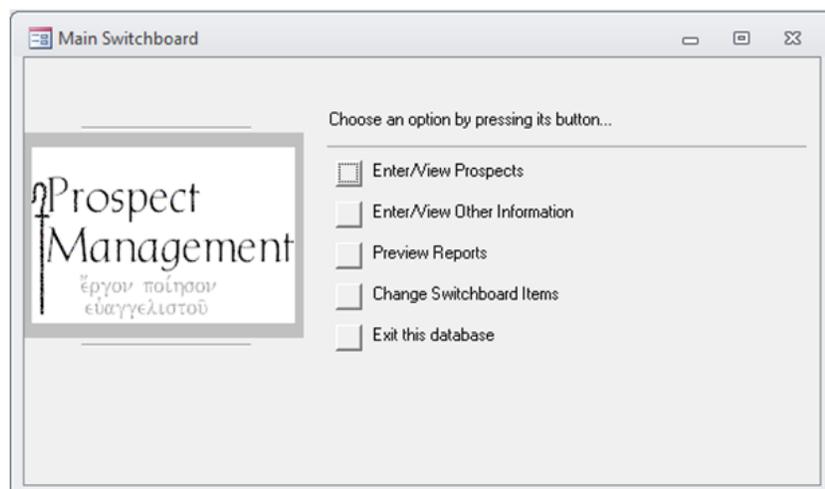


Figure 1: Prospect Management

2

Microsoft Contact Database — This little database will track calls, display pictures, and print labels. It is very simple and yet functional. This would be best for a small number of prospect records. It also requires Microsoft Access. It is downloadable, and the cost is free. It comes with several screencasts to show how to use it. Fully customizable. Technical support is provided by Microsoft for Access and is fee-based.

[Download the Simple Prospect Database here.](#)

[Watch the video on how to use it here.](#) After about three minutes, the video will talk about the ability to publish to Sharepoint. You don't need this nor do you need to know it. Hit stop.



Figure 2: Microsoft Contact Database

3

Cloud-based Commercial CRM — Do you have hundreds of contacts? Do you need to access your contact data from your mobile phone? Do you have multiple teams of prospect callers that need to coordinate their work from multiple locations? Do you want a solution that offers many options? Then you want to use a Cloud-based CRM system to track your prospect data.

Salesforce.com is the industry leader in CRM software and offers a robust cloud-based system that will allow you to connect from anywhere. There is no software to install—the data lives in the cloud and can be accessed through any internet-enabled device.

If you want this kind of access, take a look at **Salesforce Contact Management**, the module for Customer Relationship Management. This is available for a small fee per month, and there is a free trial period. Here is the link for the multiple editions of the program:

[https:// www.salesforce.com/crm/editions-pricing.jsp](https://www.salesforce.com/crm/editions-pricing.jsp)



Salesforce is fully customizable and the company has their own tech support and instructional videos. Once you sign up for the free trial, you will have access to a large amount of technical videos.

If you find this solution to be the right one for your church, you could look into a full version of Salesforce. Contact them regarding non-profit discounts. You will find, however, that the full version will not add features necessary for prospect work.

Contact Edit
New Contact

Contacts not associated with organizations are private and cannot be viewed by other users or included in reports.

Contact Edit Save Save & New Cancel

Contact Details

First Name --None-- Lead So

Last Name Contact Ov

Organization Name

Household

Title

Rating --None--

Description Information

Description

Figure 3: Salesforce Contact Management