

How to Create and Use a Simple Prospect Management System with Google Sheets

A white paper written by Pastor Rob Guenther (pastorguenther@gmail.com)

Introduction: Why use Google Sheets for prospect management?

I can readily think of at least five great reasons to choose a home-made Google Sheets prospect management solution over other more expensive and more complex system.



It's easy. Really. It is. If you know how to operate a computer mouse, have ever visited a website, and know how to type even a little, you can use Google's online tools. I'll show you how in a just a minute and you'll see just how easy it is. This is a huge point because, while some other prospect management systems may be able to do more, they also require a much bigger learning curve. The simpler the system, the easier it is to get more people involved. The more complex (even if it does have cool bells and whistles), the less likely you'll be able to get some who are intimidated by technology to sign up to help, even if they would otherwise love to be a part of the system. Rows and columns. That's all there is. So there's no time wasted on hold with customer service. Keep it simple, Sam.

It's shareable. Our goal as pastors, teachers, staff ministers, and lay leaders is not to do all the work ourselves. That's a recipe for burnout and disaster. We want to train the people of God to do the work of the Church. Systems like the one below, help to keep things running smoothly in your absence. You don't want to be the bottle neck in your evangelism plan if you get sick, take a vacation, or are called to a new congregation. Equip the saints to do the work. Teach them how. (And please, keep it simple.) As a bonus, they'll take more ownership in evangelism and be excited when someone new shows up.



It's accessible. The benefit of a cloud-based system is that your volunteers don't have to come in to church to work. They can access the spreadsheet from their work (on a break, of course!), from the library, or from home. They can access it across multiple platforms, from their PC or Mac, from their tablet or even smart phone (though there are some limitations). The Google Drive app is also free and makes it easier to get your information on the go. As an added bonus, it's always



backed up on the cloud, so when your church office computer is taken out by a virus, flood, fire, or disgruntled secretary, you don't lose your data. Google Sheets even saves revisions of your files so you can revert to an older version if data is ever lost. ¹

It's secure. Even though the data is accessible, it's not accessible to just anyone. The data that you share is password protected. It's not just floating out there on the web. There is some debate over how much access Google has to your information, but it won't just be out there on the web for anyone to stumble across. You grant access to those who have permission to view and edit (and to those who have permission to manage and grant access to others). They will need to enter a secure password to access the file keeping private data safe.



It's free. Let's face it. We don't always have tons of money to spare at our churches. Budgets are tight and many cloud-based prospect management systems come with monthly fees. Who wants to pay that monthly cost or even a one-time purchase of some special software, when you can get a simple, shareable, accessible, secure system for absolutely nothing? And even if you could, I would argue that your dollars could be better spent on promotions or mailers, on giveaways and welcome kits. Or, save the money and encourage the council to give your favorite pastor a small raise. Or, if you really want to spend money on a system, send it my way (larger bills are preferred). 😊



¹ And if you don't trust the cloud, Google's got a solution for that too. You can download Google Drive for PC or Mac and it will automatically synchronize your data from the cloud to your physical machine or an external hard drive. Then if Google goes belly-up or decides to start charging you for access, you'll still have the files locally.

Walkthrough: A Basic How to Every Step of the Way

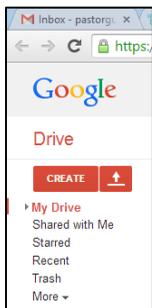
Okay, so let's get started. What follows is a simple walkthrough on how to set up and use this system. ²

1) Step One: Create a Google Account

If you don't already have a Google account, it's time to get one! You will have access to Google Drive (free cloud office suite and storage, including the tool we'll use: Google Sheets) as well as Gmail, Google Calendars, Picasa (picture storage and sharing in the cloud) and a number of other free online tools to help you get more done in less time and keep your ministry and life organized. Just click the link below and fill out the sign-up form. ³

Here's the sign-up page: <https://accounts.google.com/SignUp>

2) Step Two: Create (or Upload) Your Spreadsheet



Congratulations! You now have an account! Welcome to the wonderful world of Google! Next stop, Google Drive! Let's go to your computer. ⁴ Open up your favorite web browser (from any computer that's connected to the internet) and go to [Drive.Google.com](https://drive.google.com). Log into your Google Account to access your drive. Once there, you'll see two red buttons in the upper, left-hand corner of the screen. One says, "Create." If you want to create a spreadsheet from scratch click this one. First create

² If this isn't enough to get you started, you're more than welcome to contact me at pastorquenther@gmail.com. (But I would encourage you to Google your question first. Or, for a video walkthrough, try searching YouTube. There's a tutorial out there for just about everything.)

³ And sign away your privacy allowing Google to act as Big Brother and monitor every detail of your personal life. (Just kidding! But... not really.) ☺

⁴ Though you will be able to access this from a smart phone or tablet, I really recommend you use a computer to set it up for the first time. It's just a lot easier.

headers on Row 1 to label your data. You'll want to include any information you gather of prospects and visitors like name (obviously) and address, phone numbers and email addresses, and be sure to leave a column for notes. Put the cursor on the line between the columns above Row 1 (where you see "A," "B," "C," etc.) and click and drag to resize the width of the columns. When you're done setting up the columns, click "View," then "Freeze Rows," and "Freeze 1 Row." Now, even if you have more data than can fit on once screen, you'll always see Row 1 with the labels even as you scroll to the bottom. ⁵

Now, if you already have your prospect data in some other system. It's not hard to move it over into Google. First, if your data is in an .xls or .xlsx (Microsoft Excel) format, we can easily upload it as is and Google will automatically convert it to a Google Sheet. Remember how there were *two* red buttons in the upper left-hand side of Google Drive? Now it's time for the other one. It looks like this icon on the right. → The line with the arrow going up represents an upload. Simply click the button then "Files..." find your local file and click "Open." Now it will show up in your Google Drive. Click on the new link and edit it as you see fit.



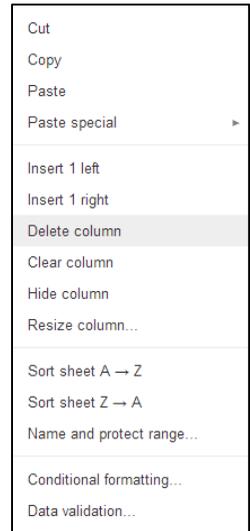
If your data is in some other prospect management system, you'll only have to add one more step. You'll just have to go into your old prospect management system and export the existing data. Usually, "File..." then "Export as..." You'll have a number of options to choose from, but usually you'll have an .xls (Excel) or .csv (Comma Separated Values) option. Choose one of these and export the data. You'll have an option of where you want to save the file on your computer. Remember where you save it because now all you have to do is upload the file into Google Drive with the same process described above. Google will automatically convert your data into a Google Sheet.

[Click here to see a sample prospect management spreadsheet.](#)⁶

⁵ I also freeze a few columns too so that I can see the prospect's name even as I scroll to the right to view other columns. You can freeze up to 10 Rows and 5 columns.

⁶ Feel free to play around with it a bit and edit the sheet. Funny and creative fictional names are encouraged. 😊 Just don't put personal information on there unless you want the world to see it.

Finally, one other quick and easy way to create you can view this sample (above) or some Google Sheet, then click “File” and “Make a copy...” Rename the copy and it’s yours to tweak or improve as you see fit. You can right-click a column or row to add another column to the right left or another row above or below. Right-click a column or row to delete a column too. You can also move the cursor to the column left of Column 1 or to the row above Row 1 and click on it. Then, when the cursor turns into a hand (☞), you can drag and drop that column or row to rearrange the order. Play around with it. Customize it. Make it fit your needs and your style. ⁷ This is another great perk of using a Google Sheet. It’s completely flexible and customizable. You can have it all set up exactly how you want it.



How are you doing? Get it all set up? If so, the hard part is done. That’s really all there is to it. You’ve got your spreadsheet all ready to go, just waiting in eager anticipation to receive the data you and your volunteers will feed it. Congratulations! ⁸

3) Step Three: Share the Sheet

Okay. So far so good. Right now, your new system is ready for you to use. You can log in to your Google account and go to Google Drive from any computer, tablet, or smart phone that’s connected to the internet to access or edit the data. You could begin using this right away as is. But, as you well know, many hands make light work. So let’s get some more people involved. It’s time to do what your mom always told you to do with your toys: “Let’s share!”

⁷ And don’t worry, you can always “Undo” if you make a mistake. Try Ctrl+Z or ⌘+Z as a shortcut.

⁸ Again, if you’re having trouble with any step along the way, please do feel free to email me at pastorquenther@gmail.com for help. After you try to search Google for the answer, if you still can’t find the solution, I’ll help you troubleshoot.

Sharing any file in Google Drive is relatively simple to do and with just a little bit of practice, you'll be a sharing pro in no time at all. Let's get to it.

First of all, if you're not already there, log in to your Google account, go to Google Drive and click on your new Prospect Management Google Sheet. Now, look in the upper right-hand corner. See the blue "Share" button? Originally it will have an icon of a lock. (But we're going to change that!) Go ahead and click it! Now you'll be presented with a number of options.



First, a line in the box will say, "Private – Only you can access." But to the right of that is a link that says, "Change..." We can ignore that for our purposes here. If you were to click "Change..." you'd be presented with three options:

- Public on the web. Anyone can find and access your data. ⁹
- Anyone with the link. No sign-in is required. ¹⁰
- Specific People.

We're going to use the third option which just takes us back to where we were if you click on this button and save. We want to keep it "Private" and locked down so this private and sensitive data will remain secure. But we do still want to share.

⁹ This option's useful for sign-up sheets or worship plans or any data that's okay to share with the world. But if you're putting names and numbers in the sheet, you probably don't want someone stumbling upon it even though it would be hard to find without you giving them the link. See how long and complicated it is? (cf.

https://docs.google.com/spreadsheets/ccc?key=0Au9L9DsiSi7zdGZRUHdldHFLNIZRbEhxYVZOeWt0cUE&usp=drive_web#gid=0) Who's going to guess all that? But still, let's be safe with the data we're posting to the internet. Lock it down!

¹⁰ Here you could share the link with someone else via an email and they could click the link from that email and access the data. But they would need to keep the link to find it again, and they would be able to share the link with anyone else. Let's be on the safe side and restrict it even more.

To do that, enter the email address of the person with whom you wish to grant access in the box at the bottom of the popup labeled, “Invite people:” Once you click in the box you’ll get an option to the right that grants different levels of access. They can either edit, comment, or view. For those who will be entering data, they’ll need to edit. For those who will be making follow-up calls or visits, they could get by with just access to view or comment on the data, but I recommend you give them access to edit so they can report how they’ve followed up right in the form. (More on this later in step six.)

Invite your volunteers and as a courtesy leave “Notify people via email” checked. Add a message to let them know what’s going on and click “Send.” They’ll get an email from you that explains the new system and has a link they can click to sign in to Google and access the spreadsheet. ¹¹

If you did it right, the icon will have changed in the “Share” button. It will no longer be a lock, but will have a picture of two silhouettes indicating that you are sharing like you should. (Your mom would be so proud!)



I like to have many volunteers help out with my follow up plans so I try to have at least 6 people involved:

- 1 person to enter the data from our Guest Register, VBS Registrations, or online Guest Register ¹²

¹¹ Note: They too will need to have a Google account. They don’t have to have Gmail to do this. You can invite a Hotmail or yahoo user, but they will have to create a Google account with that address. So they can sign in to Google with robquenter@hotmail.com for example. If they don’t have a Google account, Google will walk them through the creation process like we did in Step 1 once they click the link. You could avoid all of this hassle if you made the spreadsheet less secure by sharing with the world or with anyone who has the link, but we don’t want personal data to be leaked. So encourage them to read through Step 1 of this white paper or, better still, go help them to do it.

¹² She has access to the online Guest Register and online registration forms via the process outlined above. She also receives email notifications whenever someone fills out the forms so

- 1 person to notify the other volunteers when they see that changes have been made to the Prospect Management spreadsheet ¹³
- 1 person to follow up with phone calls
- 1 person to follow up with emails
- 1 person to follow up with hand-written cards
- Several people in various geographical locations around the different neighborhoods surrounding your church to make personal visits.

The goal is that we divide up the duties and make as many contacts with the prospect as quickly as we can. (We hope to reach them within 48 hours of initial contact.) ¹⁴

Note: *If you have a school, be sure to include the director or principal and notify that person if there is any interest expressed in the school so they too can follow up, preferably, within 48 hours too.*

4) Step Four: Create A Friendly URL (Opional) and Notifications

Okay. We've got our spreadsheet in place. We've got our volunteers all lined up. We're almost ready to go. But first, let me interject with an objection you might make. "Wait a second! How in the world are my volunteers supposed to remember the web address for the spreadsheet?! I mean, look at how long it is!!!" (cf. https://docs.google.com/spreadsheet/ccc?key=0Au9L9DsISi7zdGZRUHdldHFLNIZRbEhxYVZOeWt0cUE&usp=drive_web#gid=0)

she knows to go and copy and paste the data to the Prospect Management sheet. But more on notifications later...

¹³ In my system, this person is me. I like to pay attention to who's doing what so I can encourage them to follow through if they need a nudge, but especially to thank them when they do follow up with a visitor. The power of thanks is huge. I know they're not serving to be thanked, but to serve their Savior and share his love with others. But still, I'm grateful for their service and want to be sure to let them know. More on this later too...

¹⁴ Obviously not everyone will leave their phone number. Not everyone will leave their email address. Not everyone will leave their physical address or mailing address. That's okay. We work with what they give us. And try for at least two contacts if we can.

That makes me dizzy! And even if I could remember all that, it would take me 30 minutes just to enter the address in my browser!!!”

I hear you. But no need to fear. Your volunteers won't need to remember that long, erratic web address. You're going to make it much easier for them with two little tricks: Friendly URLs and Notifications.

Let's start with the friend URLs. A friendly URL is really just a shortcut for the internet. It's kind of like you do on your computer. When “C:\Program Files\Microsoft Office\Office15\WINWORD.EXE” is too long to remember, you just place an icon your desktop or in your toolbar. When you click on the icon, it takes you to C:\Program Files\Microsoft Office\Office15\WINWORD.EXE. Likewise, when we create a friendly URL, we're just making a shortcut that we can remember which will automatically go to that long, drawn out, two-mile web address. (In this case, https://docs.google.com/spreadsheet/ccc?key=0Au9L9DsISi7zdGZRUHdldHFLNIZRbEhxYVZOeWt0cUE&usp=drive_web#gid=0) Here are three ways to create that shortcut:

Using Friendly URLs with FinalWeb

A large majority of the churches in our church body use a web host called FinalWeb (cf. www.FinalWeb.com if you're not familiar with it.) FinalWeb makes the creation of shortcuts very easy to do. Start by logging in to your FinalWeb account. Then in the “Admin Tools” toolbox click “Site Manager” and in the left-hand column click “Tools” then “Add/Modify Friendly URLs.” In the left type the keyword (e.g. “Prospects”) and in the right paste the link to your Google sheet (copy and paste it from your browser). Then you can go to [www.\[YourSiteName\].com/Prospects](http://www.[YourSiteName].com/Prospects) and it will go straight to your Google sheet. Now that's something you and your volunteer can remember. If you aren't logged in when you do (or someone else types that in their browser) it will prompt you to log in first before you can access the information.¹⁵

¹⁵ Unless you made the sheet “Public,” another option in sharing we didn't cover because we DO want to keep the information password protected.

Using Subdomains with Your Domain Host

This feature is available if you use a different site to host your webpage than you use to purchase your domain name. (By the way, if this is all Greek to you, skip it. It's not that important. Notifications matter way more. Just go down to that section.) Here you would log in to the site where you purchased your domain name. (Let's say you purchased www.YourSiteName.com from GoDaddy. You would start by log in to GoDaddy.com.) Then manage domain names and look for an option called "Subdomains" under "Forwarding." There you can choose a subdomain (let's go with "Prospects" in this example) and you'll copy and paste the long web address out of your browser from your Google Sheet (in this case, https://docs.google.com/spreadsheet/ccc?key=0Au9L9DsISi7zdGZRUHdldHFLNIZRbEhxYVZOeWt0cUE&usp=drive_web#gid=0) into the forwarding address. Then when you're done, your shortcut would look like this: Prospects.YourChurchSiteName.com. Now that's something your volunteer can remember too.

Using Bit.ly



This one is perhaps the easiest to use, but is the least specific to your website. To start, visit Bit.ly. You'll have to create a (free) account to customize your shortcut. Otherwise it will still have a string of letters and numbers, it just won't be as long. But if you do create an account, you can name the shortcut whatever you want (provided someone else didn't beat you to it). Log in, copy and paste the link from the Google spreadsheet into bit.ly and name it what you want. For this example I chose <http://Bit.ly/sampleprospectlist>. Not as easy to remember, and not as specific to your site, but still easier to remember and use than the long string of letters and numbers that's the actual address to your Google sheet.

Note: Bit.ly **is** case sensitive. So <http://bit.ly/GuentherIsAwesome> would take you to a completely different site than <http://bit.ly/guentherisawesome>. Just so you know.

Okay on to the more important tool...

Setting Up Notifications

Now, let's go back to your Google sheet. If you made a shortcut, just type it in your browser. If you're still logged in you're ready to go. If you're not, it should prompt you to log in first before you have access to the sheet.



Now, look at the top toolbar again. Click on “Tools” then “Notification rules...” Check the box under “Notify me when...” that says “Any changes are made” and the box under “Notify me with...” that says “Email – Right away.” Then click “Save.” That’s all there is to it. But setting up the notification is really important. Now you’ll get an email anytime a volunteer updates the spreadsheet. (If you want to take yourself out of the machine, find a trustworthy volunteer to be this cog. If this one’s broken, the system falls apart.) So, when someone enters a new prospect, you get an email. When someone updates the sheet indicating that they’ve made a visit, you get an email. Whoever sets up notifications has the job of overseeing the whole system to make sure it’s running smoothly.

By the way, you can have multiple people set up notifications. Just have the volunteers with whom you shared access log in to the sheet and click on “Tools” then “Notification rules...”, check the box under “Notify me when...” that says “Any changes are made” and the box under “Notify me with...” that says “Email – Right away” just like you did, and you’ll both get an email when anything on the sheet changes.

Okay, that’s it! In four easy steps (or only three if you skipped the shortcut URL), your system is in place. The machine is built. You’ve got it well-oiled with notifications and lots of volunteers. Now it’s time to work the system.

5) Step Five: Work the System

Okay. Your sheet is all set up. Check. You've shared it with volunteers. Check. Your notifications are turned on. Check. You're all set to go. Now it's time to work the system. Ideally, you have multiple volunteers for each step of the process. The goal for me is that I, or any one of the volunteers, could disappear tomorrow and the system would continue to run. That's the whole goal of systems: to run efficiently and smoothly with as little disruption as possible if there's ever any transitions in personnel. So, here's what ideally happens next.

- 1) You get a visitor to your church.
- 2) That visitor leaves contact information for you to follow up with (whether in your guest book, your friendship register, or on a kiosk in the narthex).
- 3) Someone spots that data and puts it in the spreadsheet. (I will sometimes take a photo of the page in the paper guest register with my smart phone and then email it to myself and my data entry volunteer. This could easily be the only job of one person. Check the book and email the photo. A second person could have the only job of entering that data. Or, if you're blessed with a secretary both tasks could be a job for that person.)
- 4) You and/or another volunteer receive a notification that new data has been entered.
- 5) You and/or another volunteer send an email out with pertinent information to your other volunteers. (I will often just copy and paste the entire row and send it to all my volunteers in a preset email list.)
- 6) One volunteer looks for an email address and emails the visitor.
- 7) One volunteer looks for a phone number and calls the visitor.
- 8) One volunteer looks for a mailing address and writes a thank you card.
- 9) One volunteer looks for a physical address and tries to visit their home.
- 10) Each volunteer goes to the spreadsheet to report on what they did. (More on this in the next step.)



As you execute the plan, here are a few more thoughts:

- 1) Don't forget to pray each step of the way. Encourage your volunteers to do the same. Don't underestimate the power of prayer here.
- 2) If you're short on volunteers, of course one or two individuals could double up on duties, but I find that the more you get involved, the more you have praying for the visitors, the more invested in Evangelism you have, the more you have your members looking for visitors in worship, eager to greet them, eager to direct them to the guest register, the more excitement around sharing the Word of God. So pray to the Lord of the harvest to send more workers.
- 3) Short on time to make this happen? It's designed to have a small impact on a lot of people. It's not meant to fall on the shoulders of just one or two. Ask the Lord of the harvest to send you more help. But ultimately make the time to do this. It's just that important. Your visitors are a gift from God. To do nothing to follow up with those is to despise his gift.
- 4) You can make it easier and less threatening for your volunteers to sign up to help if you give them scripts. Don't make them figure out what to say on their own. Some just won't be comfortable doing that. Of course, the more they do it, the more comfortable they'll get and in time, they'll develop their own style and depart from the script as they see fit. But here are some examples of the scripts I give.



Ask the Lord of the harvest. Short on time. Make the time to do this. It's just that important. Have a plan. Give your volunteers scripts. Make it easy and non-threatening for them to do. They'll develop their own style the more they do it. Here are some examples: ¹⁶

¹⁶ If you have something better, please do share it with me. Email me at pastorquenther@gmail.com.

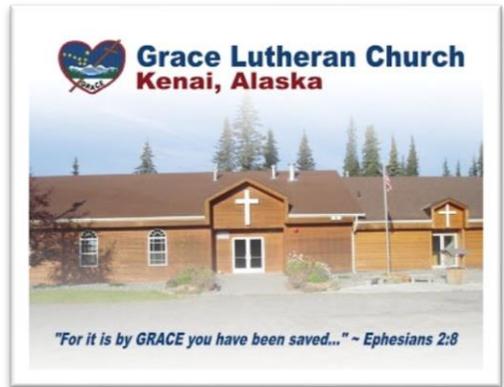


Phone/Email: "Hi. Is _____ there? Good morning/afternoon/evening! How are you? My name is _____ and I'm a member of _____ Lutheran Church, which you visited on _____. I'm just calling to thank you for worshiping with us. We're really glad you came. I'm also calling to see if you had any questions I might be able to answer or comments you'd like me to share with the leadership. [Response.] Or if you'd rather talk to the pastor directly, I'm sure he'd love to hear from you. You can reach him at (____) ____ - _____ or at _____@_____._____."

[You know, I should also let you know about [upcoming event]. We'd love to have you join us for that. You can register or find more information at www._____.

Well, thanks for your time. And thanks again for visiting us at _____. We'd love to have you come worship with us again. Blessings on your day/evening/night."

Handwritten Card: [A picture of our church with our name on it is on the front of the card, so they already know what it's about. We also include my business card in each card so they have contact information.]



"Dear _____, Thank you so much for worshiping with us on _____. We were honored to have you join us and hope you will join us again soon. If you have any questions, the pastor would love to hear from you. His business card is enclosed. For more information visit our website at _____ .I think you'll find a lot of helpful information there. Thanks again for joining us! We hope to see you again soon!"



Face-to-Face Visit: *Hi. My name is _____ . I'm from _____ Lutheran Church. I promise I won't take much of your time. But you came to visit us on _____ and I just thought I'd pop in quickly to say thanks for visiting us and to give you this gift. [Usually a Road to Emmaus or Come, Follow Me DVD.] I also thought I'd see if you had any questions I could answer. [Response.]*

Okay, well I said I didn't want to take much of your time and want to keep my word. Here's my pastor's business card. He'd love to hear from you too if you think of any [other] questions later. It was nice visiting with you. I hope to see you in church again soon. Have a great morning/afternoon/evening!

Attempted Visit with No One Home: [Write on the back of a business card and leave it tucked into the door:] *Sorry I missed you. Just wanted to thank you for visiting our church on _____. Please feel free to call or email our pastor if you have any questions. Hope to see you at _____ Lutheran again! Sincerely, [Legible Signature].*

6) Step Six: Recording What You Do

It's been said that what gets measured, gets managed. And I believe that there's a lot of truth to that. By asking volunteers to report on what they've done, you're gently holding them accountable. You also know who has been visited, emailed, or called and who has not. You (or your Evangelism Team chairman) can also report to the council (or the Mission Board) how many visits you've made that month. This, in turn, encourages them.



Reporting is simple and anyone with an internet connection can do it. They simply go to the shortcut you made (or to their Google Drive if you didn't), log in to Google (and click on the spreadsheet if there's no shortcut), and enter their visit in the columns you provide next to the visitor's name. I try to collect the name of the volunteer (in case I have follow-up questions), the type of contact (call, email, visit), any notes they may have taken (names and ages of kids, former church affiliation, how long they've lived in the area, etc.) and the date of the visit. Then I try to follow up again within a few days.

My Prayer:

I pray that this guide has been helpful to you and will be a blessing to you. I pray that it will encourage you to follow-up with the visitors that God sends your way. I pray that it will help you stay organized and on task. I pray that thought this or some other system God will help you to reach more people with the Gospel, that he will increase his Kingdom, and that he will bless you and others. I will continue to keep you in my prayers! God bless!

Again, if you need more help with any of the steps above, please don't hesitate to contact me directly. Email is preferred, but if you prefer another way, find me on the web or in the synod yearbook. Thanks for reading and blessings on your outreach efforts!

Your servant in Christ,

A handwritten signature in black ink, appearing to read 'Rob Guenther', written in a cursive style.

Pastor Rob Guenther
pastorguenther@gmail.com