



2 THE BAY GROUPS

Next to actually facilitating your small group, following up with prospects is the **most important responsibility**. Often times those that sign up for your group have stepped out of their comfort zone to do so. I am sure you can remember some of the feelings you had when signing up for the first time. It is so crucial for us to keep this in mind and make following up with them a huge priority.

There are many ways to follow up with a prospect. However, we ask that your first communication attempt is always a phone call and that it is made **within three days** of them signing up for your group. Always try to contact a prospect a minimum of three times.

## FOLLOW UP WITH A PROSPECT

Step 1: Click on "VIEW QUEUE" in the green box, from your email. Each time someone signs up for your group, you will get an email.



Step 2: If you are not logged into My Bay Church, you will be promted to do so.

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8	My Bay Church - The Bay Church	3 The Bay Church	
	⊗ + The Bay Church	Connect with us	
· · · · · 🔶	Username athena@thebay.church	🖺 Forms 🗎 Calendar	
$\rightarrow$	Password		
	Keep me logged in for 30 days LOGIN		
	Request Account Forgot Password?		
	Powered by 🛞 crusics community Builder, All Rights Reserved.	In purple IEEE or Received Account under the login bax clicking IEEE or Received Account under the login bax to the left. You will be sent an activation email if we have a matching email on file. Mess sure you read our TERMS OF USE, and then you'll be ready to roll	
	Terms of Service + Privacy Policy	My Bay Church is our online resource to help you stay connected at The Bay Church. Once logged in, you'll be able to:	
		<ul> <li>Interact with your small groups and/or serving teams</li> <li>Discover your passions, skills, spiritual gifts</li> <li>Securely give online and access and download your giving records</li> <li>Customize your communication preferences and stay up-to date with current happenings and much morel</li> </ul>	
		My Bay Church is our tool to support your involvement at church - whether you serve, are in a small group, have	

Step 3: Click on the name of the participant to see their contact information. You will notice the words Not Started in a red box. This indicates that no follow up has been done with this participant.

≡	Concord Campus +	Search name, phone	e or email	Q	0	ŝ	888 🗘	
ŵ	Home	SG: ONLINE   ATHENA < back to process	Q	Actions				
ይ	People			Actions	dd o por	oon to thi		
(Q))	Groups	Timing:     Relative - 0 Days       Manager Email:     Assigned On, Unassigned On       Default Email:     Default Email - None Selected       Parent Process:     CN-SG: 2022 Spring Sign Ups		Add a qu	eue mana	ger	s queue	
<u></u>	Events	PEOPLE QUEUE MANAGERS		Send a n	ail merge			
$\oslash$	Check-In	Hiding people assigned to some or due after Jun 21 with a Waiting status Selec	st All	1 Not St	arted			
$\bigcirc$	Schedules & Plans	Gumby Pokey NotStated Due: Tuesday, June 21, 2022	View Ccept	MY ST	ATS - TH	IIS QUEL	JE	
\$	My Giving	Queue days: Due Today Send E Assigned to: Athena Bocanegra	Email	0 Done	1.1			
	Forms	Remove Other Actions Mark As Done		o This W o This M o This Ye	еек, о Las onth, о La ar, о Last	t week ist Month Year		

Step 4: Once you have written down their phone number and/or email address to initiate contact, click on "BACK TO QUEUE" next to their name.

Home	SG: ONLINE   ATHENA / back to queue	Actions
People		
Groups	Gumby Pokey Not Started Send Email	Remove from queue
Events	Phone: (925) 458-9100 Mobile (925) 458-9100 Home	Reassign
Check-In	Campus: Concord Campus Address: 4725 Evora Road Concord, CA 49453 (map)	Change this person's queue status to: In Process   Waiting
Schedules & Plans	Assigned to: Athena Bocanegra reassign Stats: Due Today o days in queue, due on Tue, Jun 21, 2022	Email Athena Bocanegra Email another manager Send a mail merge
My Giving	NOTES PROCESS QUEUES FORMS INVOLVEMENT FAMILY MEMBERS	
Forms		
Communication		
Reports & Metrics	Who can see this note about Gumby Pokey? Huh?	
	Add this note	
	Jun 10, 2020 Process Queue (CN-CO: LEADERSHIP PIPELINE: Volunteer) note left by Sarah Poindexter, shared with appropriate leaders Involved in Children	

#### Step 5: Initiate contact.

As stated before, we ask that the first contact be made <u>within 3 days</u> of receiving the email AND be made via a phone call. We do ask that you attempt contact 3 times and suggest using the following forms: the initial phone call, an email and a text.

EXAMPLE PHONE CALL

SG Leader:	Hi this is	from The Bay Church, is Sarah available?
Prospect:	Oh Hey! This is Sarah!	
SG Leader:	Oh good, I'm glad I caught	you- is now a good time?
Prospect:	Yeah, now's great!	
SG Leader:	Well, I saw that you signed	up for my small group & I just wanted to
	give you some details. We r	neet every Friday at 6PM & would love to
	have you join us! Our addre	ess is 123 Sesame Street in Clayton.
Prospect:	Oh that sounds great I wou	ld love to come this week!
SG Leader:	Perfect! See you then!	

Step 6: Click on the box to the right of the participant's name. The box will turn blue and a check mark will appear to indicate you have select it. Now click on the button titled "OTHER ACTIONS", toward the bottom of your screen.



## Step 7: Click on the "NOTE" tab. The default tab is always Edit.

Gumby Pokey Due: Tuesday, Oueue days: I	Other Actions	View Un-Accept Send Email	N
Assigned to: A	Edit Note Email Other Queues		0
Remove Other Actions Mark	Change Due Date		
	Change Status Status		
	Assign To Queue Manager		
	Cancel Perform Action		

Step 8: Record all notes in the space provided under "LEAVE A NOTE". Be as detailed as possible. This is viewable by our team. Click on the circle next to "APPROPRIATE LEADERS". It will turn blue to indicate you have selected it. Now, click on "PERFORM ACTION" at the bottom right of this window.

Hiding people assigned to come else or due after Jun 21 with a Waiting status	Select All
Gumby Poker Due: Tuesday Other Actions	View Un-Accept
Assigned to: A Edit Note Email Other Queues	Send Email 0
Remove Other Actions Mark Leave a Note	0
Contacted via phone 6/21/2022	
Who can see this note? <u>Huh?</u> • Appropriate leaders Process queue managers Only me	
Cancel Perform Action	<b>—</b>

Alright, so you have initiated contact and input your notes, but your not quite done yet.

Do you remember back in Step 3, when we pointed out the status that said "NOT STARTED" in a red box?

If you do not update the status, the small group team will be alerted and you will continue to receive emails alerting you as well.

Now let's go update that status!

Step 9: Click on the box to the right of the participant's name. The box will turn blue and a check mark will appear to indicate you have select it. Now click on the button titled "OTHER ACTIONS", toward the bottom of your screen.



Step 10: Make sure you are on the Edit tab. Click on the arrows for the drop down under "CHANGE STATUS".

	Manager Email: Assigned On, Unassigned On Default Email: Default Email: None Selected Parent Process: CN-96: 2022 Spring Sign Ups PEOPLE QUEUE MANAGERS	
lans	Hiding people assigned to prome else or due after Jun 21 with a Whiling status Select All Constructions Other Actions Constructions Constructi	1 Not Started MY STATS - THIS QUEUE 0 Done
n rtcs	Remove Other Actions Mari Change Due Due Change Status Status Assign To Due to Manager	
	Cancel Perform Action	

Step 11: Select "IN PROCESS" from the drop down menu. Click on "PERFORM ACTION" at the bottom right of this window.

Percept E OUTELIE MAN			
Hiding people assigned to	eone else or due after Jun 21 with a Waiting status	Select All	QUEUE STATS
Remove Other Actions Mark	Edit Note Email Other Queues Change Due Date Change Status Visiting In Process Not Started	Un-Accept Un-Accept Send Email	0 Done o This Week, o Last Week o This Month, o Last Month o This Year, o Last Year

Hiding people assigned to gene else or due after Jun 21 with a Walting status Select AI     Sumbly Four Actions     Other Actions     Marrier     Change Due Date     Change Status     In Process     Assign To   Queue Manager     Select AI     Marrier     Select AI     Marrier     Select AI     Weill     Select AI     Select AI<		E MANAGERS		QUEUE STATS
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Sending an email to the participant is recommended as an additional form of contact. You may use whatever email platform you are comfortable with. If you would like to email the prospect through My Bay Church, follow the steps below.



#### Step 2: Click on the "Bell Icon" on the right of the home page.



Step 3: Click on "PROCESS QUES" on the drop down menu on the right.

	🛞 Home   The Bay Church	
	Search name, phone or email	× Notifications
		Process Queues
ORMS	MY GROUPS	
and the second	Our Church CN-All Profiles	
and the second second	BW-CO: Brent	
THERE	BW-SG: - *Sma BW-VA: The B	
and the second second	CN-ADM: Dee	
	CN-CO- Admir	

Step 4: Locate the desired queue (most of you will only have one queue listed) and click on it



Step 5: Click on the box to the right of the participant's name. The box will turn blue and a check mark will appear to indicate you have selected it. Now click on the button titled "OTHER ACTIONS", toward the bottom of your screen.



## Step 6: Click on the "EMAIL" tab. The default tab is always Edit.

Due: Wedneso Queue days:		Accept Send Email	MY STATS - THIS QUEUE
Assigned to: L	Edit Note Email Other Queues		0 Done
Remove Other Actions Mark	Change Due Date		
	Cancel Perform Action		

Step 7: Enter a Subject in the "SUBJECT" field. Use the "MESSAGE" field to write the body of the email. Click on the box next to "SAVE A COPY OF THIS EMAIL IN EACH PERSON'S NOTES". The box will turn gray and a check mark will appear to indicate you have selected it.



Step 8: Click on "PERFORM ACTION" at the bottom right of this window. Great Job! You just sent an email AND added a note to the prospect.

Parent Process: CN-SG: 2022 Spring Bign Ups PEOPLE QUEUE MANAGERS		Edit this queue Send a mail morge QUEUE STATS	
Highing papete assigned to up up on the fact of the effect Jun 12 with a strate strate of the effect Jun 12 with a strate str	Select All	1 Not Standard 1 Unavalgovo MM STATS - THIS QUEUE 0 Done a Thin Work, or Last Work, a Thin Stanh, or Last Work, a Thin Year, or Last Work, a Thin Year, or Last Year	
Also send a copy of this email to me.     Save a copy of this email in each person's notes.  Cancel Perform Action			

## EXAMPLE EMAIL

#### Sarah,

This is Suzie. I am a small group leader at The Bay Church. I called yesterday and left a message but I figured I would also follow up with an email to give you some more details about our group. We meet every Friday at 6PM and we would love to have you join us! Our address is 123 Sesame Street in Clayton. We would absolutely love to have you! Feel free to email me back or call me at 555-555-5555 with any questions. Hope to see you this Friday!

Warmly, Suzie Q



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You have contacted the prospect and made notes in My Bay Church, what now? If the prospect has decided to join your group, follow the steps below to add them to your group roster.

**A PROSPECT IS JOINING YOUR** 

Step 1: Login to My Bay Church

## thebaychurch.ccbchurch.com/goto/login < > The https://the baychurch.ccbchurch.com/goto/login O My Bay Church - The Bay Church ③ + The Bay Church Conn 自 Username athena@thebay.church Password ..... Keep me logged in for 30 days LOGIN Password:\_\_ Username:\_\_

Step 2: Click on "BELL ICON" on the right of the home page.



# Step 3: Step 3: Click on "PROCESS QUES" on the drop down menu on the right.



CN-ADM: Dee CN-CO: Admin CN-CO: Churc CN-CO: Outsin

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Step 4: Locate the desired queue (most of you will only have one queue listed) and click on it



Step 5: Click on the box to the right of the participant's name. The box will turn blue and a check mark will appear to indicate you have selected it. Now click on the button titled "MARK AS DONE", toward the bottom of your screen.

This will automatically add the individual to your participant list!





You have contacted the prospect and made notes in My Bay Church, what now? If the prospect will not be joining your group, follow the steps below to delete them from your process queue and close them out as a prospect.

## A PROSPECT IS NOT JOINING YOUR GROUP

## Step 1: Login to My Bay Church thebaychurch.ccbchurch.com/goto/login

••• • • < >	thtps://thebaychurch.ccbchurch.com/goto/login
	B My Bay Church - The Bay Church
	⊛ + The Bay Church
· · · · · · ·	Username athena@thebay.church
• • •	Password
•	Keep me logged in for 30 days
	LOGIN
Username:	Password:

## Step 2: Click on "BELL ICON" on the right of the home page.



## Step 3: Click on "PROCESS QUES" on the drop down menu on the right.

			Search name, p	phone or email	X Notifications
					Process Queues
RECENT ACTIVITY	MESSAGES FO	RMS		MY GROUPS	
				Our Church CN-All Profiles BW-CO: Brent BW-SG: - *Sm BW-YA: The B CN-ADM: Dee CN-CO: Admi CN-CO: Churc CN-CO: Outsi CN-CO: Outsi CN-SG: *Grou CN-SG: *Host	
Y BAY C	HURC	СН	2	CN-SG: - "Sma CN-SG: CONC CN-SG: Conce CN-SG: CONC CN-SG: Conce CN-SG: Conce	
H TRACK SESSMENT	GIVE ONLINE	SERVING OPPORTUNITIES	SMALL GROUP LEADER PORTAL	CN-SG: Conce CN-SG: Online CN-SYS: All S CN-WM: BRAV	

Step 4: Locate the desired queue (most of you will only have one queue listed) and click on it

#### Bible Study Follow Up

Concord Campus • CN-SG: 2022 SMALL GROUP LEADERSHIP

## CO-ED Follow Up

Concord Campus • CN-SG: 2022 SMALL GROUP LEADERSHIP

### SG: ONLINE | ATHENA

Concord Campus • CN-SG: 2022 Spring Sign Ups

Step 5: Click on the box to the right of the participant's name. The box will turn blue and a check mark will appear to indicate you have selected it. Now click on the button titled "REMOVE", toward the bottom of your screen.

#### This will automatically remove the individual off of your participant list!

Timing:       Relative - 0 Days         Manager Email:       Assigned On, Unassigned On         Dofault Email:       Default Email- None Selected         Parent Process:       CN-SG: 2022 Spring Sign Ups         PEOPLE       QUEUE MANAGERS	Add a person to this queue Add a queue manager Edit this queue Send a mail merge QUEUE STATS
Hiding people assigned to someone else or due after Jun 28 with a Walting status	Select All Vew Accept Send Email <sup>1</sup> Not Started 1 Unassigned MY STATS - THIS QUEUE MY STATS - THIS QUEUE O Done • This Week, o Last Week • This Week, o Last Week • This Week, o Last Week • This Year, o Last Year

1 Unassigned

## **BETTER TOGETHER**

