



**MY BAY CHURCH**

*Prospects*



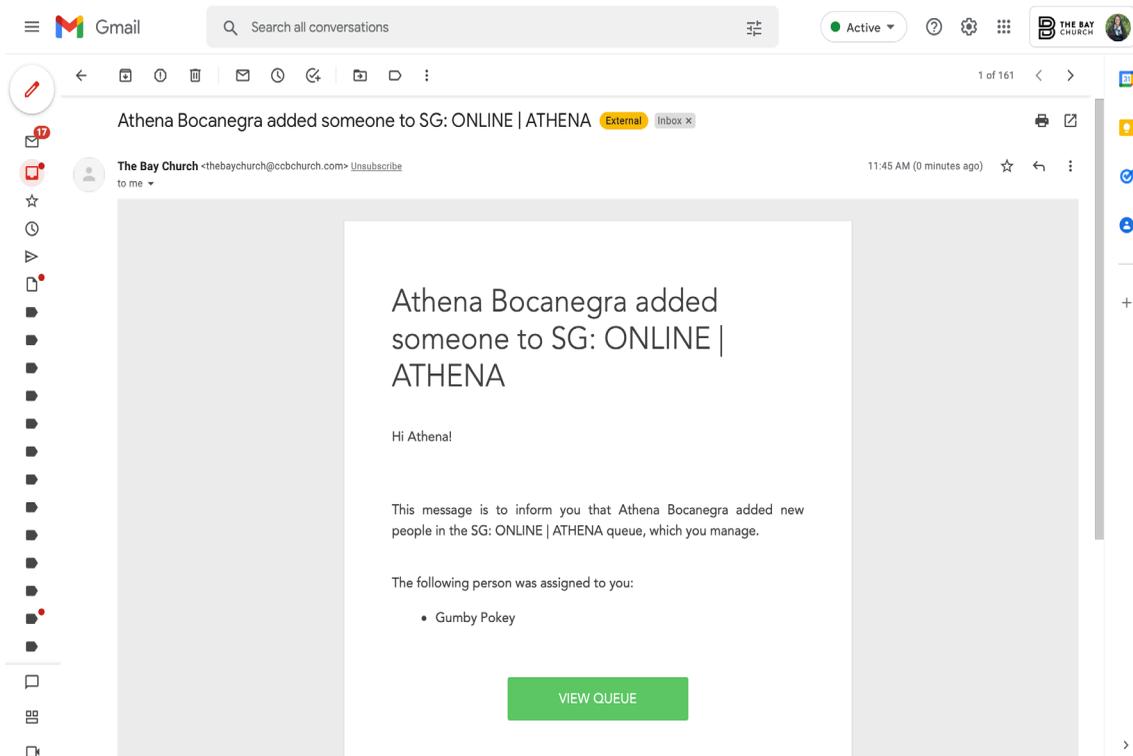


Next to actually facilitating your small group, following up with prospects is the **most important responsibility**. Often times those that sign up for your group have stepped out of their comfort zone to do so. I am sure you can remember some of the feelings you had when signing up for the first time. 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.

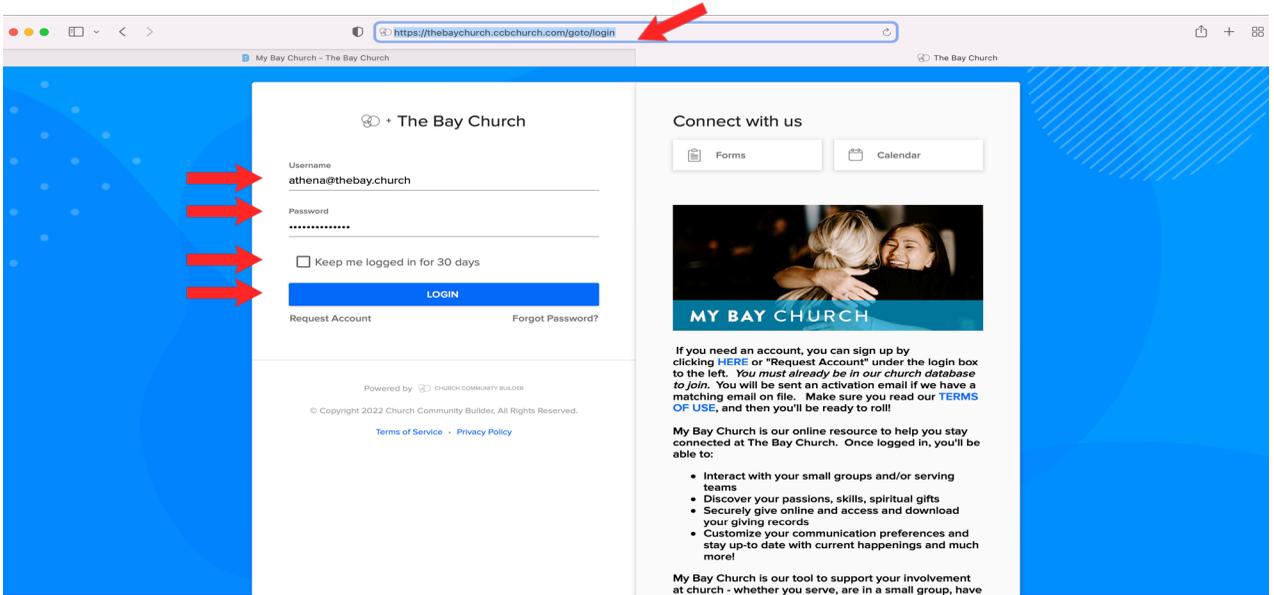
## FOLLOW UP WITH A PROSPECT

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.**

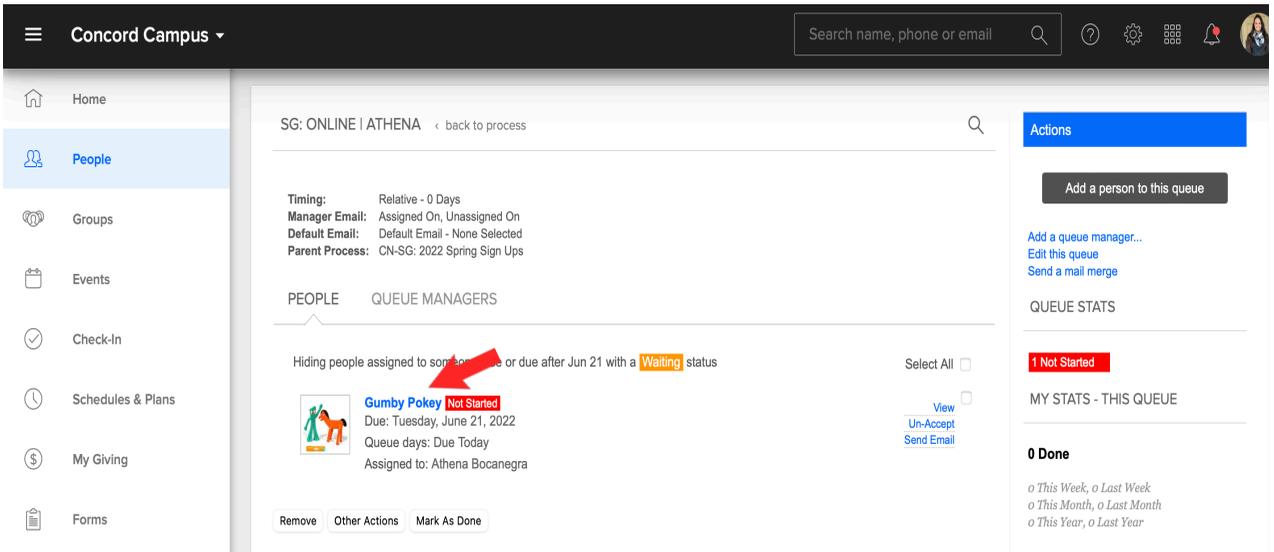


Step 2: If you are not logged into My Bay Church, you will be prompted to do so.

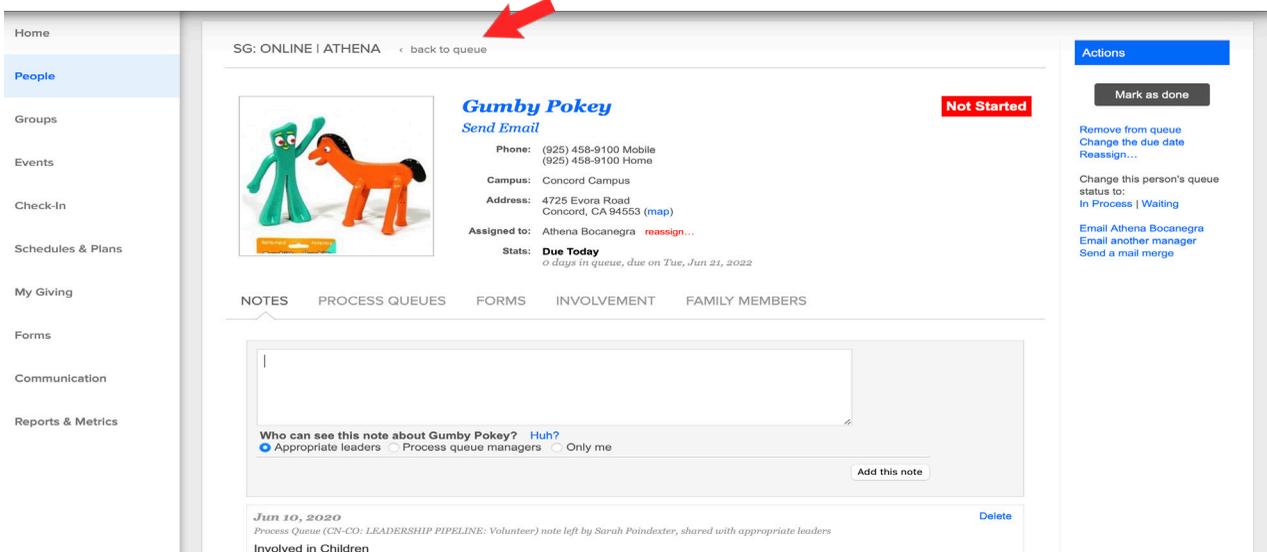
**Username:** \_\_\_\_\_ **Password:** \_\_\_\_\_



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.**



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.



Step 5: Initiate contact.

**As stated before, we ask that the first contact be made within 3 days 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 meet every Friday at 6PM & would love to have you join us! Our address is 123 Sesame Street in Clayton.  
**Prospect:** Oh that sounds great I would 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.

**Timing:** Relative - 0 Days  
**Manager Email:** Assigned On, Unassigned On  
**Default Email:** Default Email - None Selected  
**Parent Process:** CN-SG: 2022 Spring Sign Ups

PEOPLE QUEUE MANAGERS

Hiding people assigned to someone else or due after Jun 21 with a **Waiting** status



**Gumby Pokey** **Not Started**  
Due: Tuesday, June 21, 2022  
Queue days: Due Today  
Assigned to: Athena Bocanegra

Remove Other Actions Mark As Done

Select All   
View   
Un-Accept  
Send Email

Ad

Add a queu  
Edit this qu  
Send a mai

QUEUE S

1 Not Star

MY STAT

0 Done

o This Wee  
o This Mon  
o This Year

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

**Other Actions**

Edit Note Email Other Queues

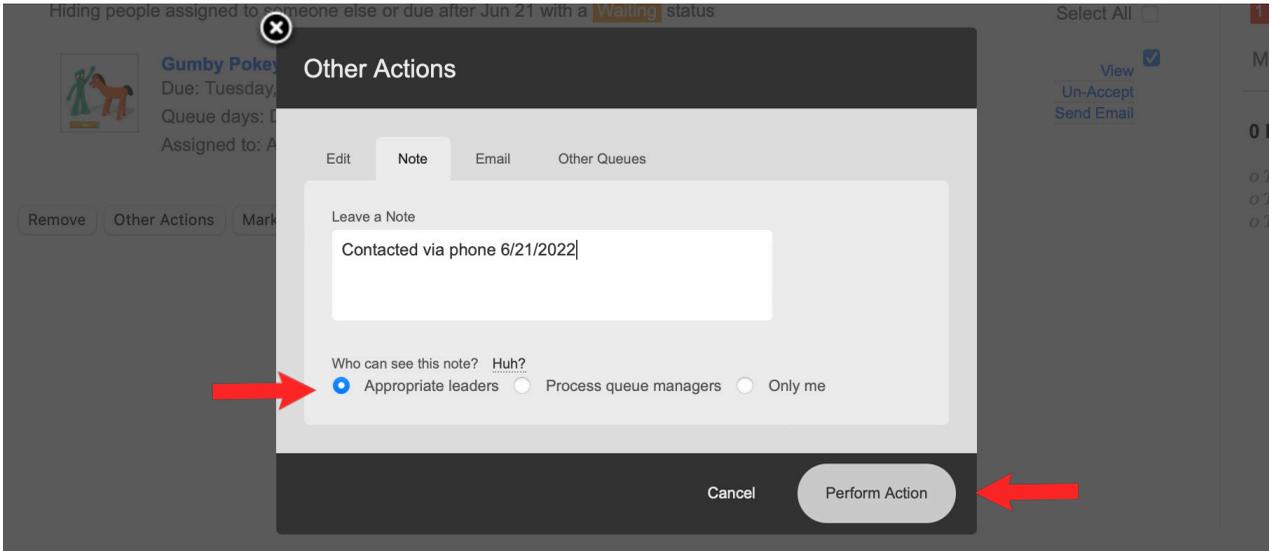
Change Due Date

Change Status

Assign To

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.



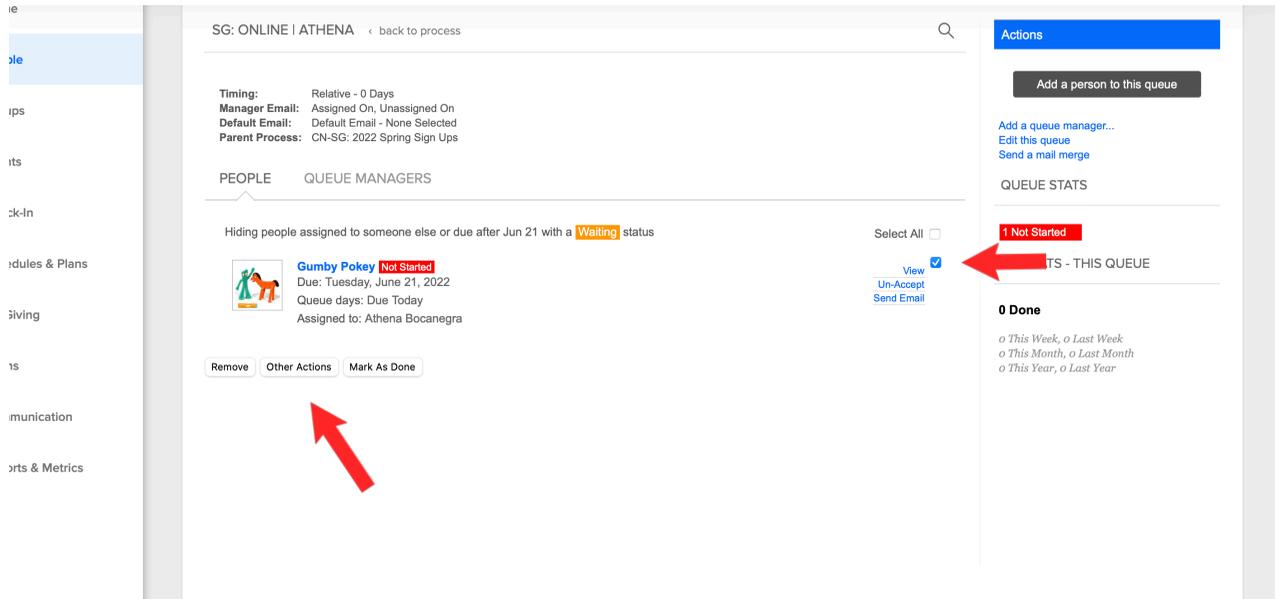
Alright, so you have initiated contact and input your notes, but your not quite done yet.

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

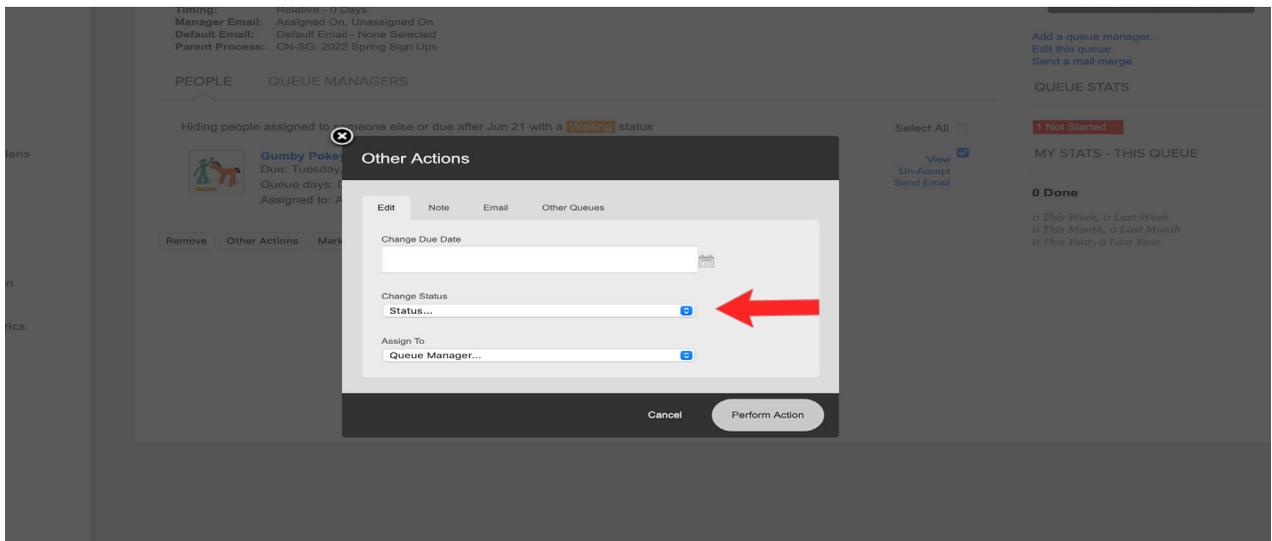
If you do not update the status, the small group team will be alerted and you will continue to receive emails alerting you as well.

Now let’s go update that status!

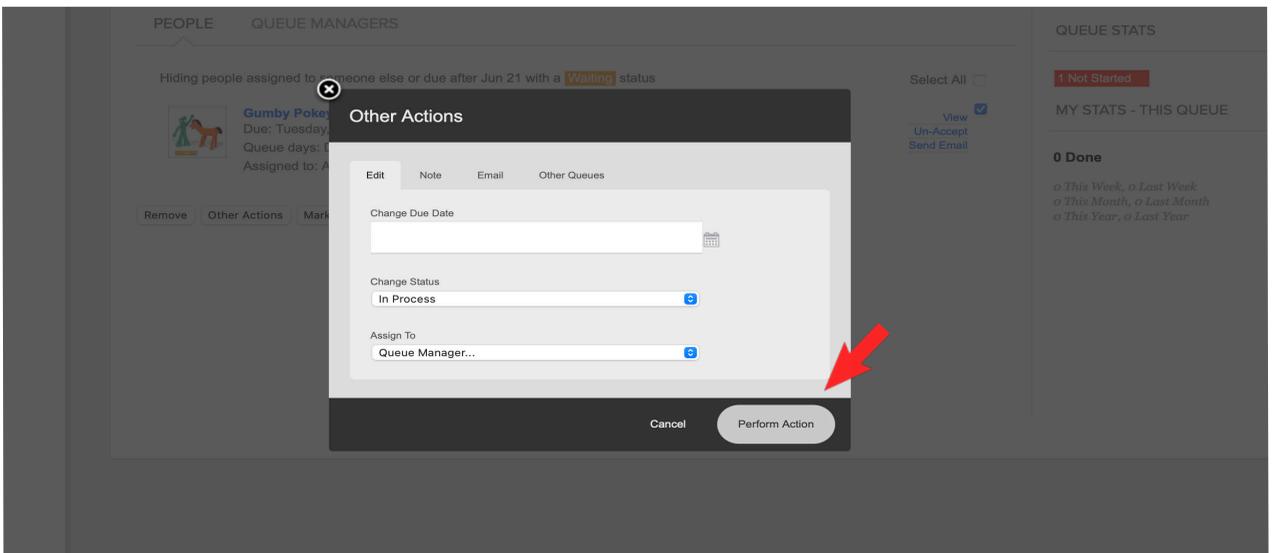
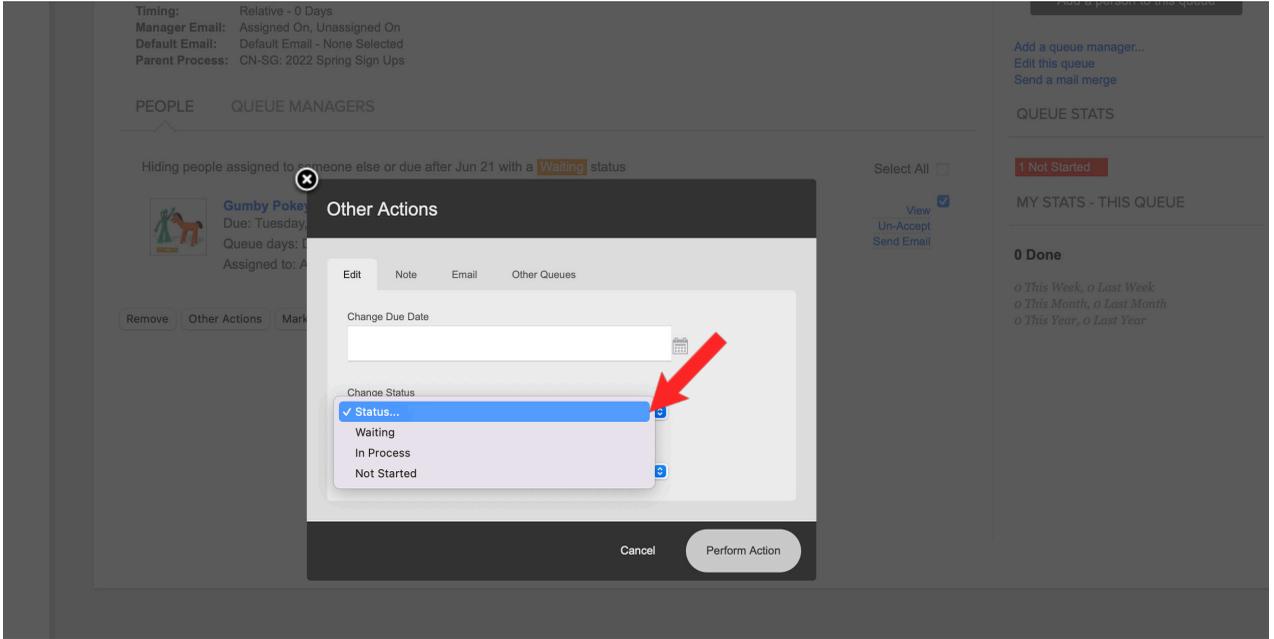
Step 9: Click on the box to the right of the participant's name. The box will turn blue and a check mark will appear to indicate you have select it. Now click on the button titled "OTHER ACTIONS", toward the bottom of your screen.



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



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

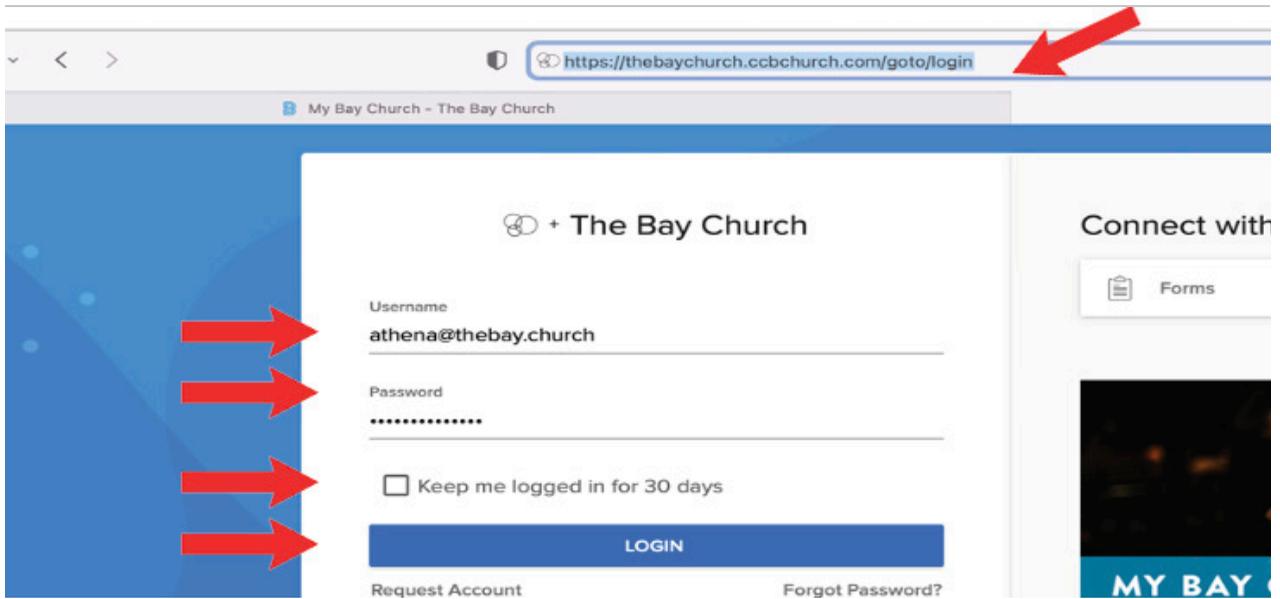




Sending an email to the participant is recommended as an additional form of contact. You may use whatever email platform you are comfortable with. If you would like to email the prospect through My Bay Church, follow the steps below.

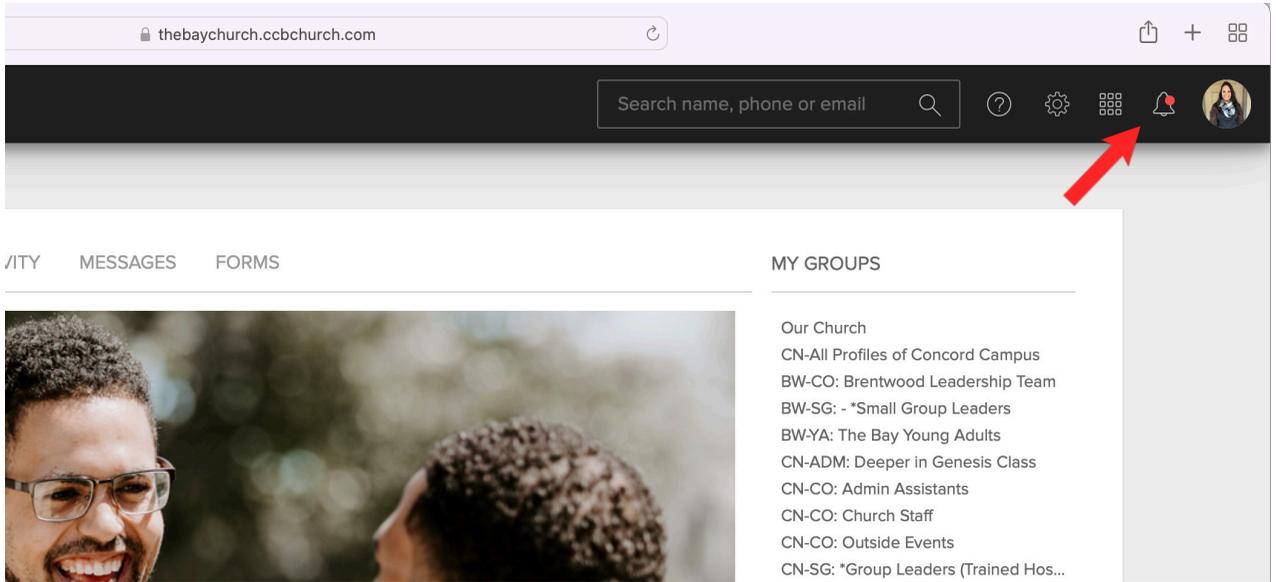
## EMAIL PROSPECT USING MY BAY

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

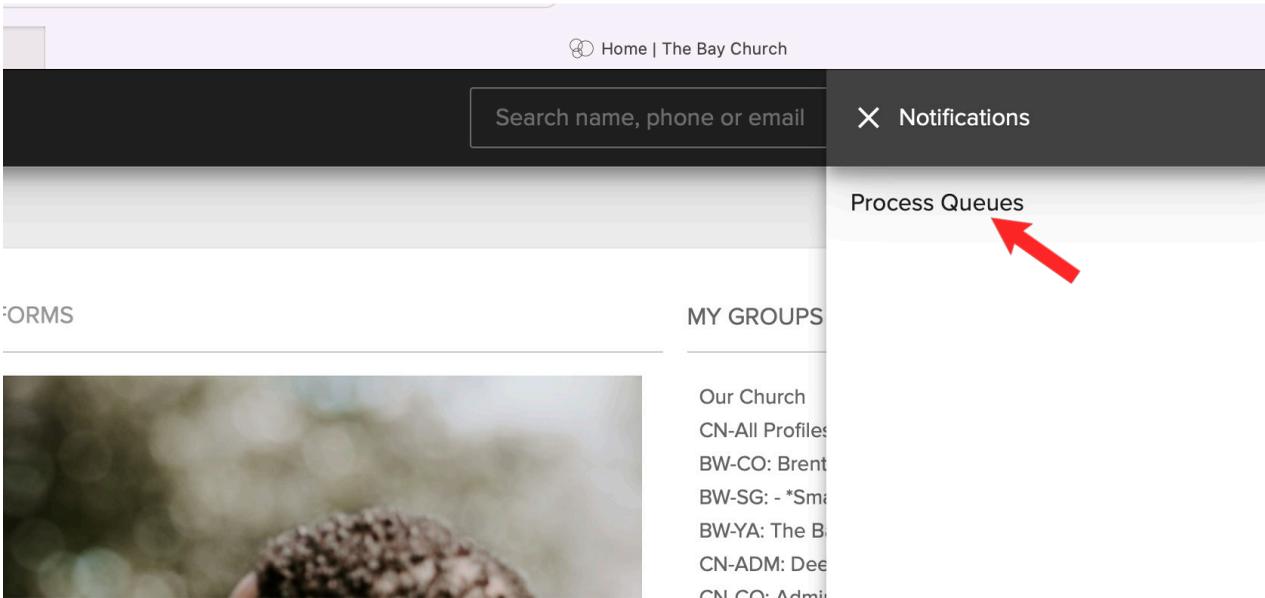


Username: \_\_\_\_\_ Password: \_\_\_\_\_

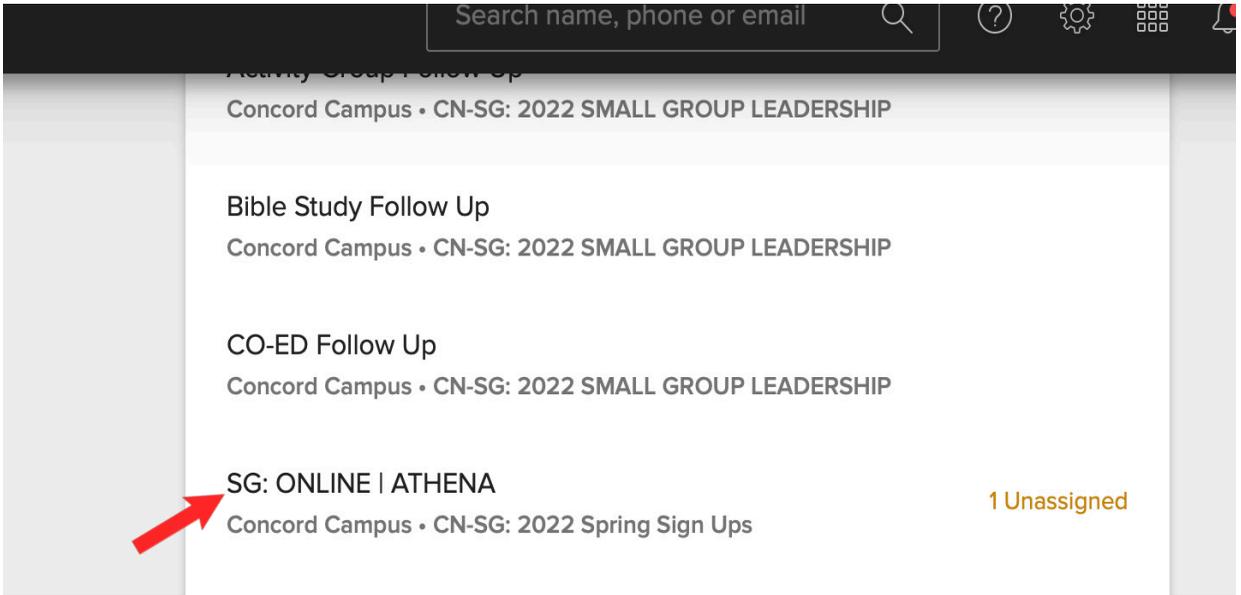
Step 2: Click on the “Bell Icon” on the right of the home page.



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



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

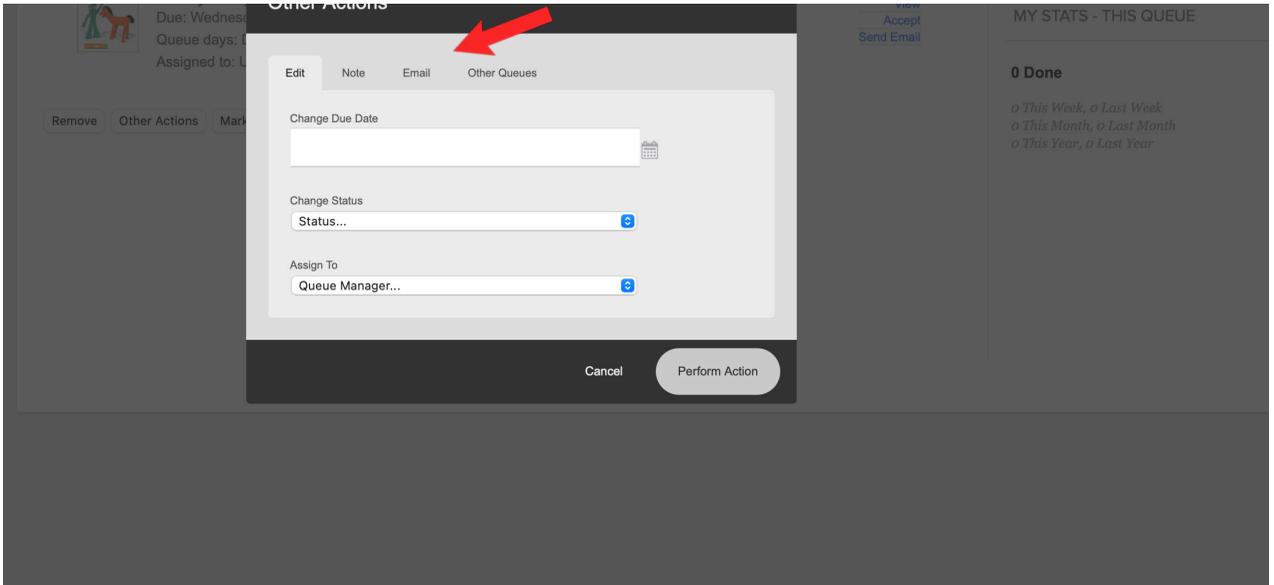


Step 5: Click on the box to the right of the participant's name. The box will turn blue and a check mark will appear to indicate you have selected it. Now click on the button titled "OTHER ACTIONS", toward the bottom of your screen.

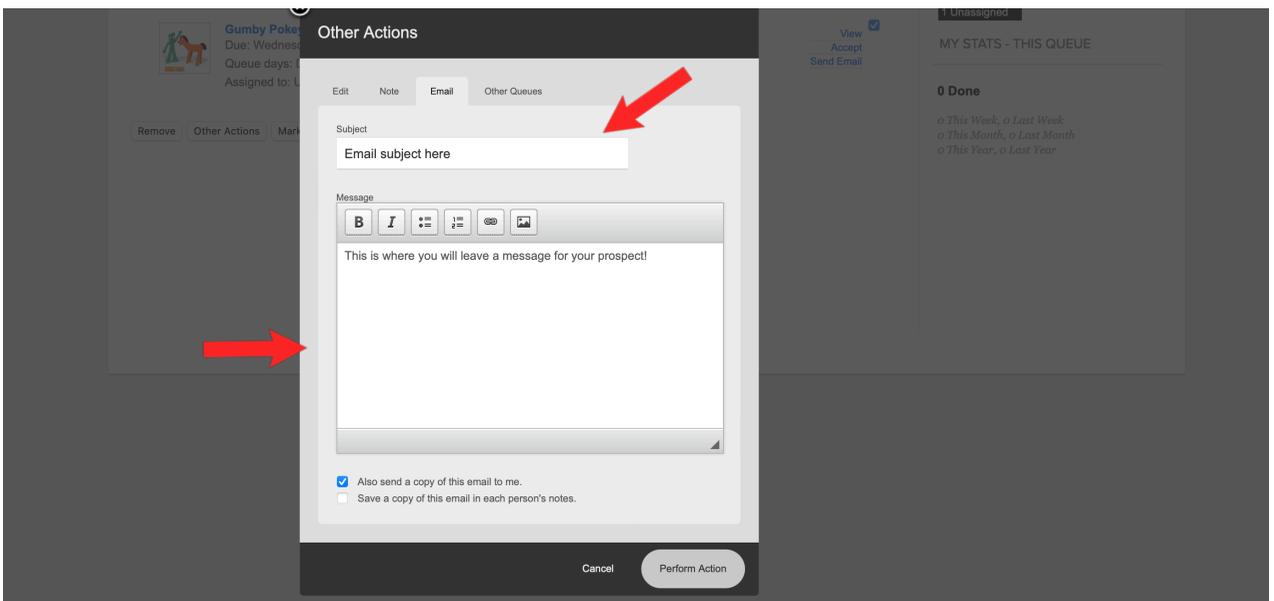


Step 6: Click on the “EMAIL” tab.

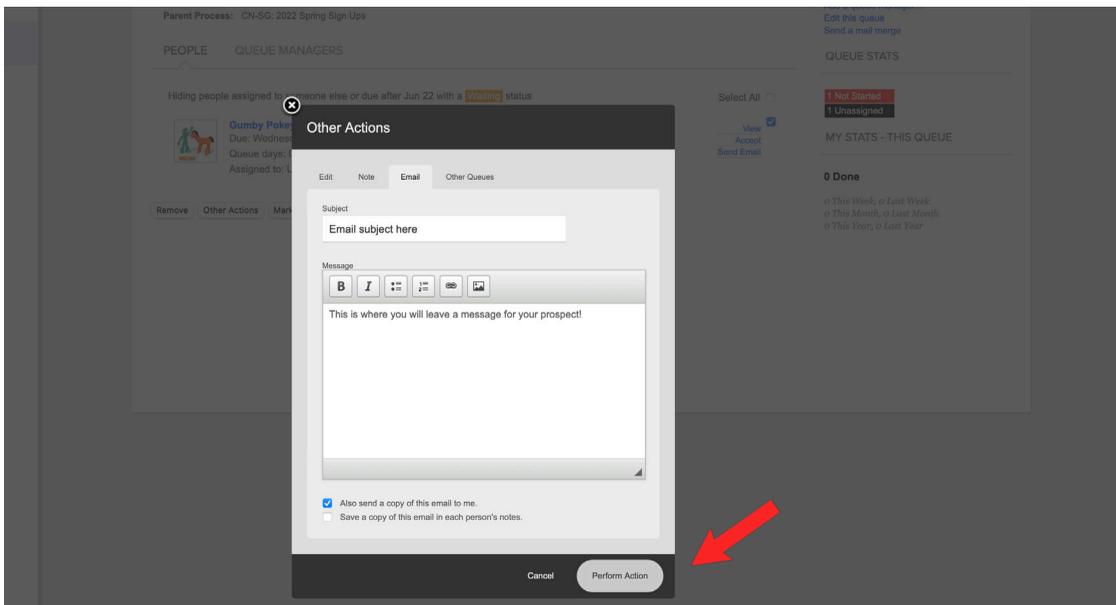
**The default tab is always Edit.**



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.**



## 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!**

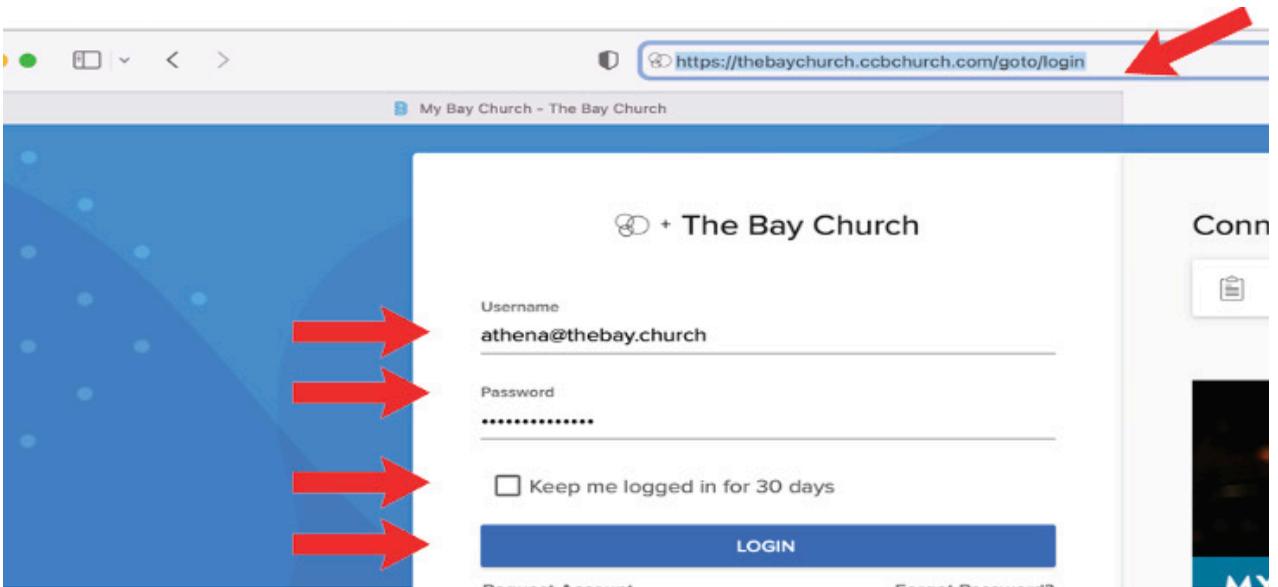
**Warmly,  
Suzie Q**



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.

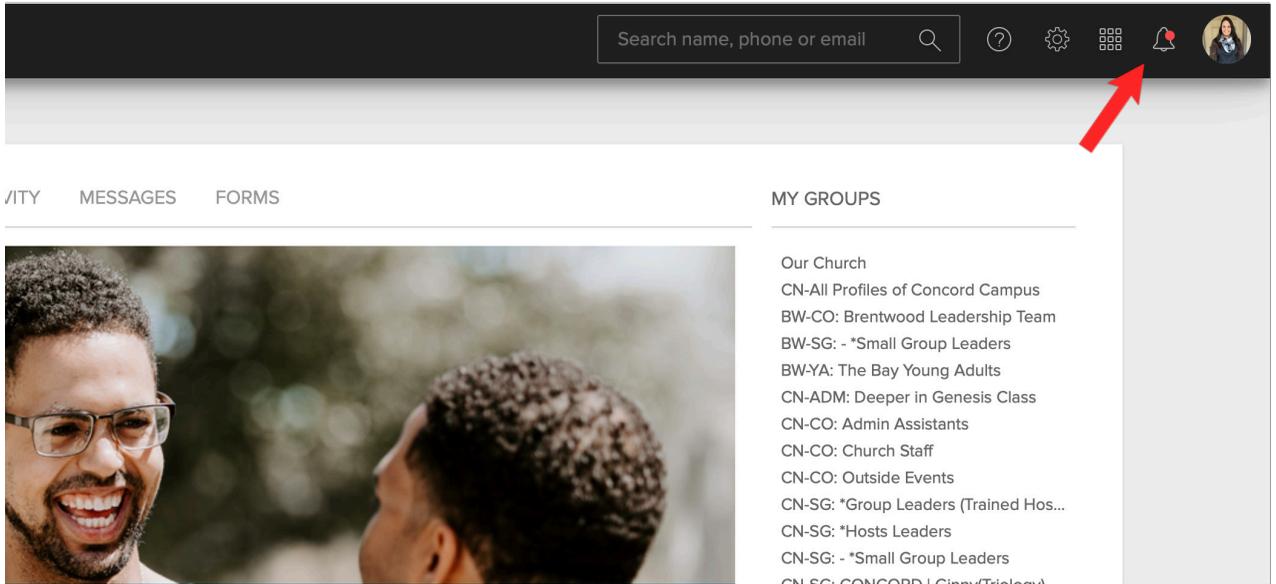
## A PROSPECT IS JOINING YOUR

Step 1: Login to My Bay Church  
**[thebaychurch.ccbchurch.com/goto/login](https://thebaychurch.ccbchurch.com/goto/login)**

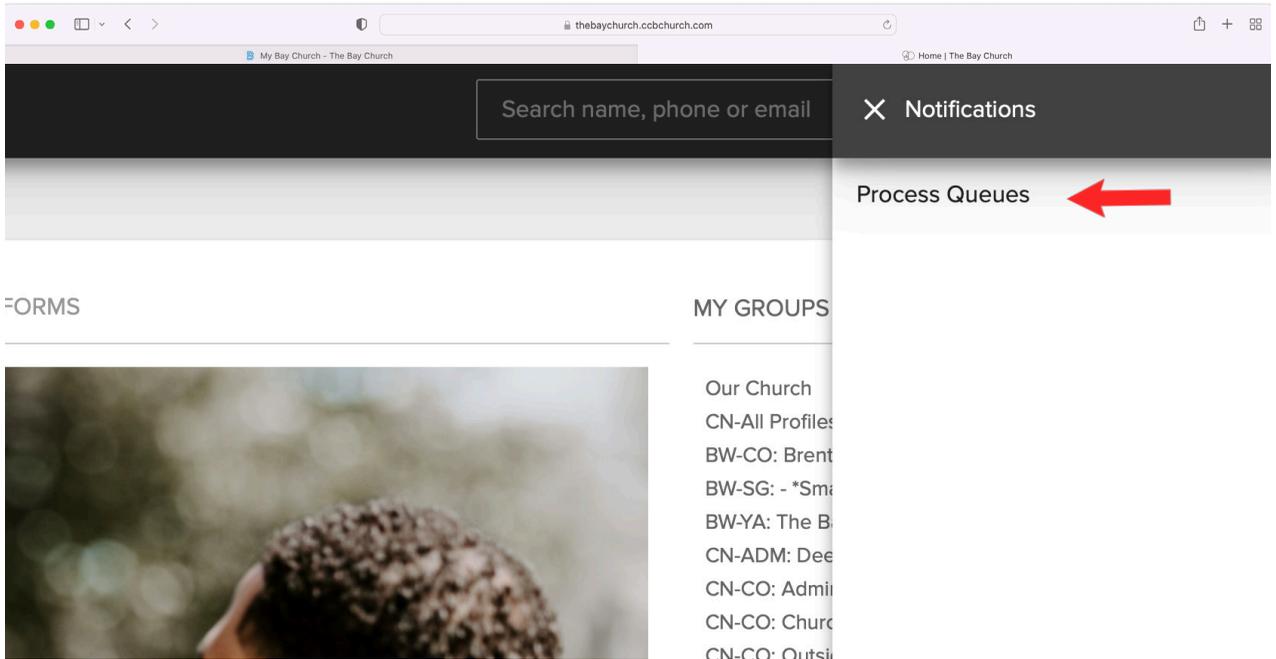


Username: \_\_\_\_\_ Password: \_\_\_\_\_

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.



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

Concord Campus • CN-SG: 2022 SMALL GROUP LEADERSHIP

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** ← 1 Unassigned  
Concord Campus • CN-SG: 2022 Spring Sign Ups

STEP 1: Fill out Host Info Form  
Concord Campus • CN-SG: Host a Group Leadership

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!**

PEOPLE QUEUE MANAGERS

Hiding people assigned to someone else or due after Jun 28 with a **Waiting** status

 **Gumby Pokey** **Not Started**  
Due: Tuesday, June 28, 2022  
Queue days: Due Today  
Assigned to: Unassigned

Select All

View  
Accept  
Send Email

QUEUE :  
**1 Not Started**  
**1 Unassigned**  
MY STATUS  
**0 Done**  
o This Week  
o This Month  
o This Year

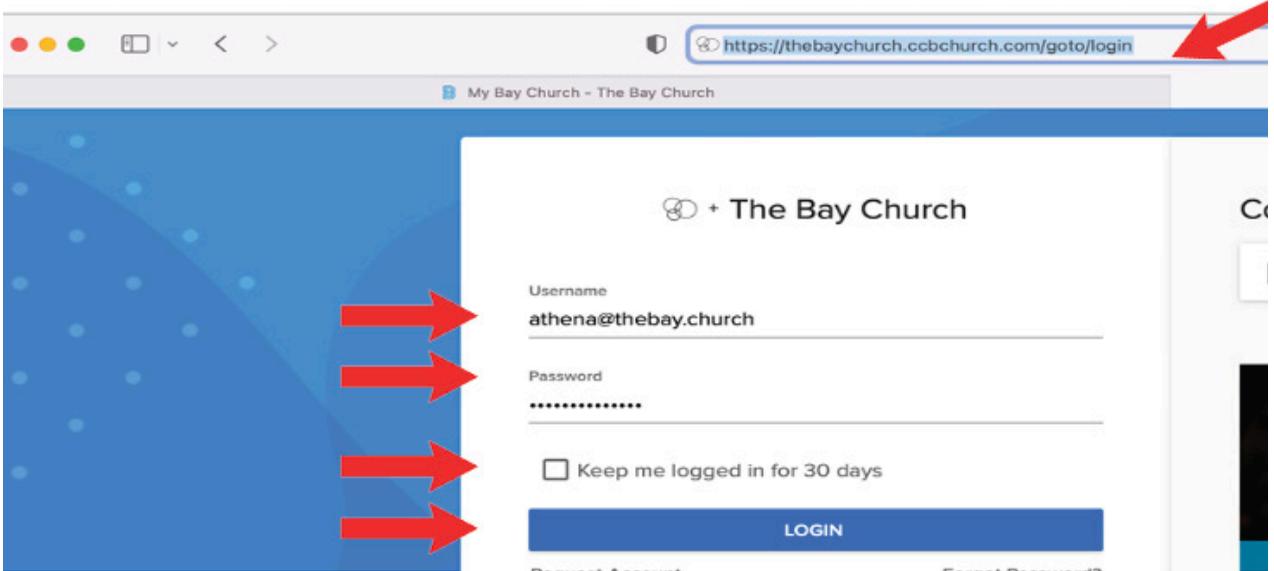
Remove Other Actions **Mark As Done**



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.

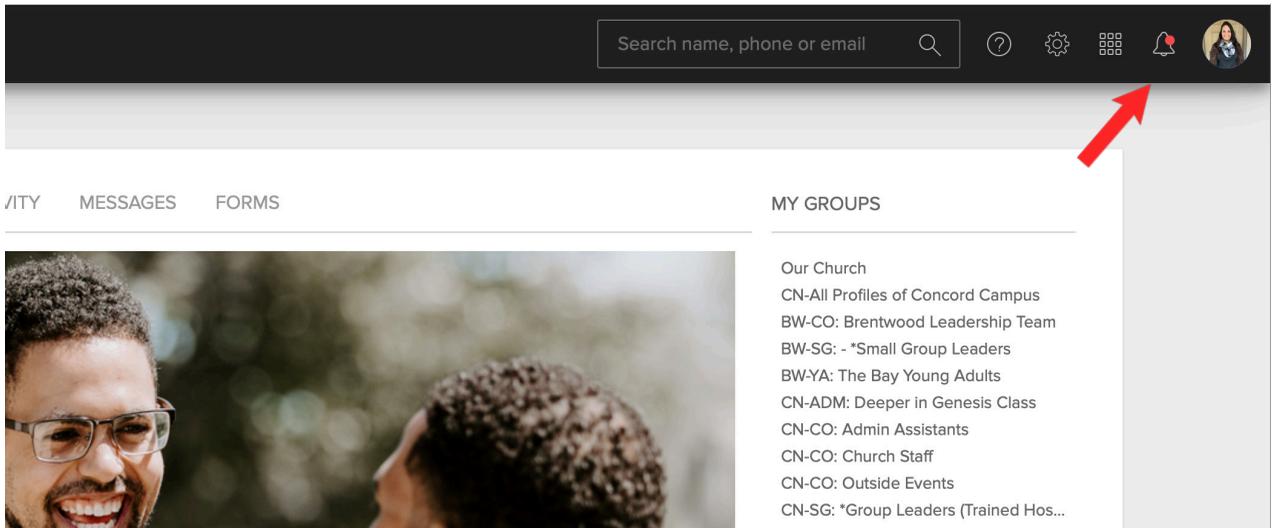
## A PROSPECT IS NOT JOINING YOUR GROUP

Step 1: Login to My Bay Church  
**[thebaychurch.ccbchurch.com/goto/login](https://thebaychurch.ccbchurch.com/goto/login)**

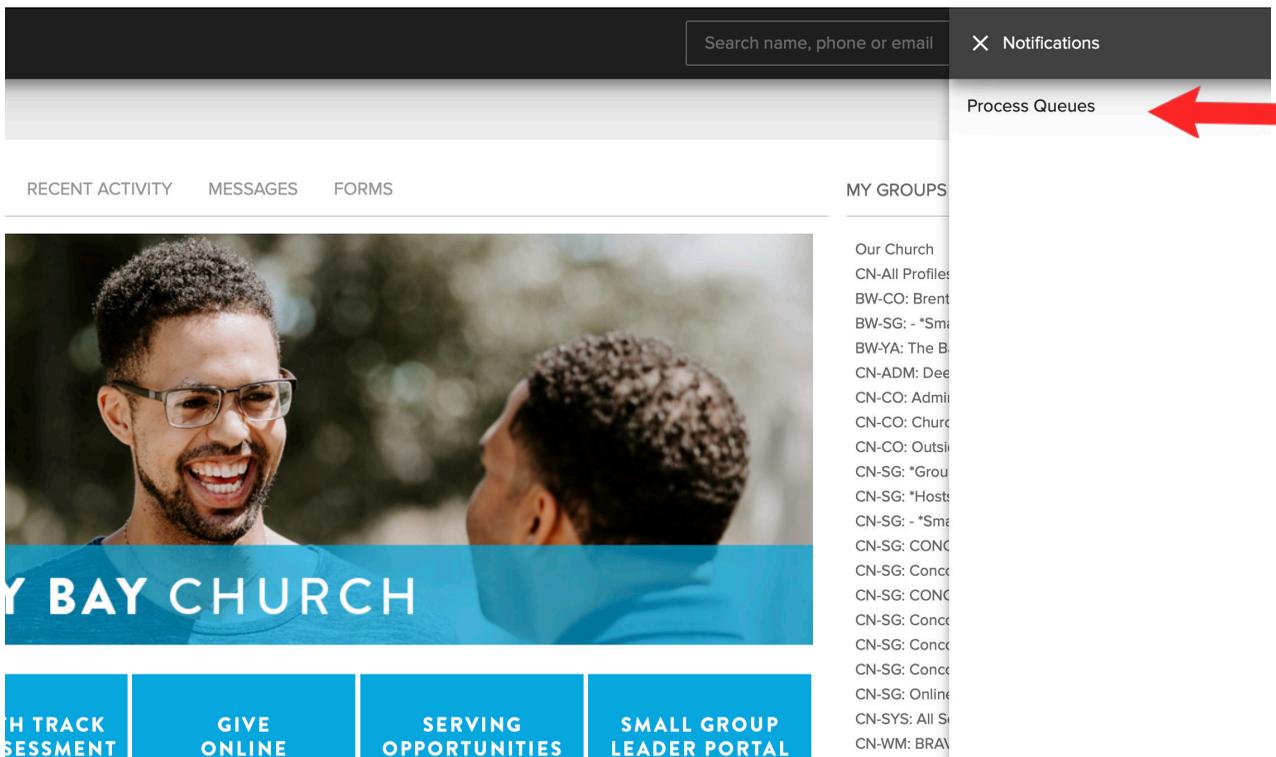


Username: \_\_\_\_\_ Password: \_\_\_\_\_

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.



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

1 Unassigned



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  
Default Email: Default Email - None Selected  
Parent Process: CN-SG: 2022 Spring Sign Ups

PEOPLE QUEUE MANAGERS

Hiding people assigned to someone else or due after Jun 28 with a **Waiting** status

**Gumby Pokey** **Not Started**  
Due: Tuesday, June 28, 2022  
Queue days: Due Today  
Assigned to: Unassigned

**Remove** Other Actions Mark As Done

Add a person to this queue

[Add a queue manager...](#)  
[Edit this queue](#)  
[Send a mail merge](#)

QUEUE STATS

Select All

View  
 Accept  
 Send Email

**1 Not Started**  
**1 Unassigned**

MY STATS - THIS QUEUE

**0 Done**

*o This Week, o Last Week*  
*o This Month, o Last Month*  
*o This Year, o Last Year*

**BETTER TOGETHER**



2022