



Communication

Follow up visitor training

Introduction

Follow up visiting should be a non negotiable element of the communication strategy. The focus of follow up is twofold: the delivery of information requested (e.g. a Gift Aid declaration) and the building of personal relationships. To achieve these two goals some simple training of a team of lay visitors is strongly advisable.

Follow up visiting is not complex. Keep it relaxed and provide some light refreshments half way through the session. A PowerPoint presentation to structure a training session can be accessed from the [follow up visitor training](#) web page on the Giving in Grace site.

- The crucial thing to communicate to potential visitors is that people are expecting someone to call. Follow up visitors are not asking for money or an increase in giving but responding to a request made by the person they will visit. The thank you letter has indicated that someone will call so their visit will come as no surprise.
- The golden rule is **don't assume – explain**. Just because someone has asked for envelopes does not mean they will know what to do with them. The relevant information brochures explain what each request is about, the Gift Aid scheme, why Standing Orders are so helpful and what to do with envelopes when you have missed church for three weeks.
- Familiarise visitors with the literature where available. Show the brochure, letters, and response forms people will be given. You may wish to discuss differentiation but beware of too much time being spent on this.
- Familiarise visitors with the explanatory leaflets. These leaflets offer advice on Gift Aid, planned

giving envelopes and Standing orders. They are given to people who have asked for information about these ways to give to the church. This supporting literature is accessed from the Handling Requests for Information [web page](#).

- Emphasise the importance of **conversation**. The availability of supporting literature is of enormous benefit to visitors because it provides the basis for a one to one conversation. Visitors can call with the literature and invite the person to read it and then offer to answer any questions.
- This brings us to the second golden rule of follow up visiting: it is all about building on **relationships** rather than focusing on the money. You may find it helpful to use the [Handout for Follow up Visitors](#) but beware of too much paper. It might be better used as a handout at the end of the evening for visitors to take home.
- Make sure visitors are at ease with the technical issues. Visitors will need some simple training so that they know how answer any questions about completing a Gift Aid form or a standing order form if asked during the visit. If they do not know the answer they should be clear about who they should contact for more help and how to contact them promptly.
- Stress the value of efficiency and prompt action. Administrators who open the response forms should get any requests for information to visitors as soon as possible. Absolutely no more than three weeks should pass between first receipt of the response form and the visit by the visitor with the requested information.