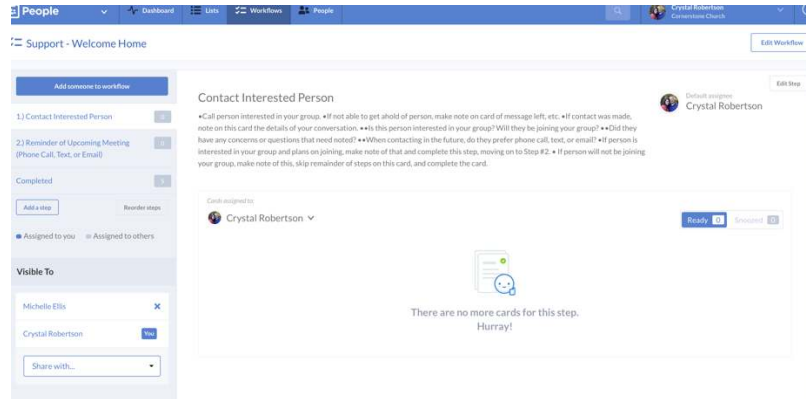




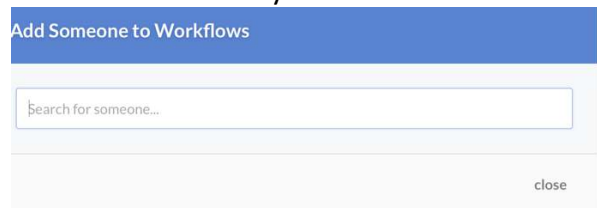
Leader Training | Workflows for Groups

A workflow is a series of steps that help us connect people to various areas of ministry. In this context, we're connecting people into groups via Workflows.

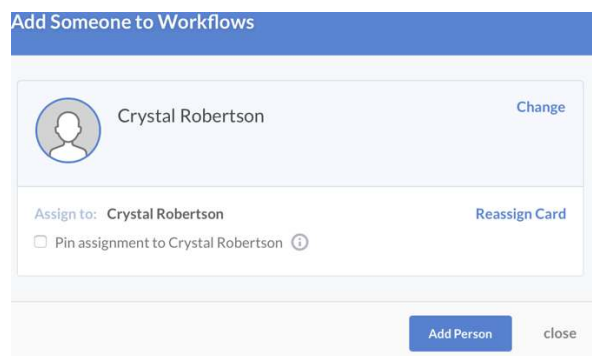
Below is pictured a workflow for a group. You will notice that there are no cards ready for this workflow.



To add someone to your workflow click the blue bar that says "Add someone to workflow"



Begin to type their name in the search bar and then click the blue "Add Person"



Crystal then show up under your cards





Leader Training | Workflows for Groups

Then you will see step one:

WORKFLOW: SUPPORT - WELCOME HOME

Current Step: Contact Interested Person ✔ Complete step

• Call person interested in your group. • If not able to get ahold of person, make note on card of message left, etc. • If contact was made, note on this card the details of your conversation. • Is this person interested in your group? Will they be joining your group? • Did they have any concerns or questions that need noted? • When contacting in the future, do they prefer phone call, text, or email? • If person is interested in your group and plans on joining, make note of that and complete this step, moving on to Step #2. • If person will not be joining your group, make note of this, skip remainder of steps on this card, and complete the card.

Next Step: Reminder of Upcoming Meeting (Phone Call, Text, or Email)

Add internal note | Send email To Crystal Robertson

Your note
This note will be visible to anyone who can see this card. Save Note

Currently assigned to Crystal Robertson
Reassign Card
 Pin assignment ⓘ
Snooze...
Remove Crystal from Workflow

You can utilize this to send out a personalized email to your potential group member and make notes by clicking the tabs at the top of the box. We have given some guidelines of what you might do with this particular step of the workflow.

Step Two looks like this in the Workflow:

Crystal Robertson
cr Robertson@comenstones.org No phone number

WORKFLOW: SUPPORT - WELCOME HOME

Current Step: Reminder of Upcoming Meeting (Phone Call, Text, or Email) ✔ Complete step

Send details of your group (i.e., location, time, day) within a week prior to meeting date. Remind them you are excited for them to join your group!
**Do not complete this step until you have completed this task. • If need be, set snooze on this card to the date you want to be reminded to complete this step.

Next Step: Card is complete

Add internal note | Send email To Crystal Robertson

Your note
This note will be visible to anyone who can see this card. Save Note

Currently assigned to Crystal Robertson
Reassign Card
 Pin assignment ⓘ
Snooze...
Remove Crystal from Workflow

Again, this will have the person's email or phone where you can reach out again and remind them of the next group meeting or invite them again.

For more information regarding Workflows, [click here](#).

