

CITK

Implementing Church Analytics with
CITK Software



Implementing Church Analytics in CITK Software for a Church Organization

To gain valuable insights into church operations, member engagement, and donation trends, implementing effective analytics in CITK Software is crucial.

Here's a step-by-step guide to setting up church analytics:

1. Setting Up Attendance Trends Analysis

Step 1: Create Custom Fields for Attendance Tracking

1. Navigate to Settings: Go to Settings > Custom Fields.
2. Create New Custom Fields: Click on **+ Add Field** and create the following custom fields for attendance tracking:
 - Service Date: Date
 - Service Time: Time
 - Attendance Count: Number

Step 2: Design an Attendance Tracking Form

1. Navigate to Forms: Go to Marketing > Forms.
2. Create a New Form: Click **+ Create New Form**.
3. Design the Form Fields: Add the following fields:

- Service Date: Date
- Service Time: Time
- Attendance Count: Number

Form Settings: Configure the form with the following settings:

- Form Name: Attendance Tracking Form
- Sticky Contact: On
- Submit Action:
- Message: "Thank you for submitting the attendance information!"
- Redirect URL: [Thank You Page URL]

Click Save Form: Click Save Form and Integrate Form.

Step 3: Automate Attendance Tracking

1. Navigate to Workflows: Go to Automation > Workflows.
2. Create a New Workflow: Click + Create Workflow and name it Attendance Tracking Workflow.
3. Set Up the Workflow Trigger: Click + Add New Trigger, choose Form Submitted, and select the Attendance Tracking Form.

Add Workflow Actions: Configure actions such as sending a confirmation email to the submitter with the following content: Subject: Attendance Submission Confirmed

Hi {{contact.first_name}},

Your attendance submission for the {{service_time}} service on {{service_date}} has been received.

Attendance Count: {{attendance_count}}

Thank you for your valuable contribution.

Blessings,

[Your Name]

4. [Your Role] Click Save Action.
5. Activate the Workflow: Click Save and toggle the switch to activate the workflow.

2. Setting Up Member Engagement Metrics

Step 4: Create a Member Engagement Form

1. Navigate to Forms: Go to Marketing > Forms.
2. Create a New Form: Follow similar steps as above to create and configure a form dedicated to tracking member engagement.

Creating a New Form

Click `+ Create New Form`

Design the Form Fields

- Member Name: `First Name, Last Name`
- Engagement Type: `Dropdown` (e.g., Volunteer, Attendance, Donation)
- Engagement Level: `Single Select` (e.g., High, Medium, Low)

Form Settings

- Form Name: `Member Engagement Form`
- Sticky Contact: `On`
- Submit Action:
- Message: `Thank you for providing engagement data!`
- Redirect URL: [Thank You Page URL]

Save the Form

Click `Save Form` and `Integrate Form`

Automate Member Engagement Workflows

1. Navigate to Workflows: Go to `Automation` > `Workflows`.
2. Create a New Workflow: Click `+ Create Workflow` and name it `Member Engagement Workflow`.
3. Set Up the Workflow Trigger: Click `+ Add New Trigger`, choose `Form Submitted`, and select the `Member Engagement Form`.
4. Add Workflow Actions: For example, send a thank-you email with the following details:
 - Click `+ Add New Action` and choose `Send Email`.
 - Configure the email:

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- Subject: Thank You for Your Continued Engagement
- Hi {{contact.first_name}},
- We appreciate your commitment and engagement with [Church Name].
- Engagement Type: {{engagement_type}}
- Engagement Level: {{engagement_level}}
- Your support makes a difference!
- Blessings,
- [Your Name]
- [Your Role]

Click 'Save Action'

Activate the Workflow:

Setting Up Donation and Giving Trends Analysis

Create a Donation Tracking Form

1. Navigate to Forms: Go to 'Marketing' > 'Forms'.
2. Create a New Form: Click '+ Create New Form'.
3. Design the Form Fields: Add fields such as 'Donation Date', 'Donation Amount', and 'Donation Campaign' with appropriate input types.
4. Form Settings: Set the form name to 'Donation Tracking Form', enable 'Sticky Contact', and configure the submit action with a message and redirect URL.
5. Save the Form: Click 'Save Form' and 'Integrate Form'.

Automate Donation Tracking Workflow

1. Navigate to Workflows: Go to 'Automation' > 'Workflows'.
2. Create a New Workflow: Click '+ Create Workflow'.

Setting Up the Donation Tracking Workflow

Name the workflow

3. Set Up the Workflow Trigger:

- Click `+ Add New Trigger`.
- Choose `Form Submitted`.
- Select the `Donation Tracking Form`.

4. Add Workflow Actions:

A. Send Donation Acknowledgment Email:

- Click `+ Add New Action`.
- Choose `Send Email`.
- Configure the email:

Subject: Thank You for Your Generous Donation!

Hi {{contact.first_name}},

Thank you for your generous donation of \${{donation_amount}} to [Campaign Name].

Your support helps us continue our mission to make a positive impact in our community.

Blessings,

[Your Name]

[Your Role]

Click `Save Action`.

5. Activate the Workflow:

Click `Save` and toggle the switch to activate the workflow.

4. Creating Custom Reports for Church Analytics

Step 8: Monitor Key Metrics via Custom Reports

1. **Navigate to Custom Reports:** Go to `Reports` > `Custom Reports`.
2. **Create a New Custom Report:** Click on `+ New Report` and name the report `Church Analytics Dashboard`.
3. **Add Relevant Data to the Report:** Click `+ Add New Widget` and choose data sources like:
 - `Forms`: Track the number of donations, attendance, and engagement submissions.
 - `Workflows`: Monitor workflow status.
 - `Payments`: Track donation trends and amounts.
4. **Customize the Dashboard:** Rearrange the widgets and add filters for specific data.
5. **Save and Share the Report:** Click `Save Report` and share with the church leadership team.

5. Additional Tips

- **Smart Lists:** Use smart lists to segment data for targeted analytics.
- **Recurring Metrics:** Automate the collection of recurring metrics for consistent analysis.
- **Feedback Collection:** Collect and analyze feedback to improve overall church operations.

Let us know if you need further assistance or clarification on any step!

Build God's House with Excellence



Whatever you do, let these verses inspire you to carry out all your tasks with dedication, excellence, and a sincere heart aimed at honoring God.

Colossians 3:23-24 "Whatever you do, work at it with all your heart, as working for the Lord, not for human masters, since you know that you will receive an inheritance from the Lord as a reward. It is the Lord Christ you are serving."

Proverbs 16:3 "Commit to the Lord whatever you do, and he will establish your plans."

Ephesians 6:7-8 "Serve wholeheartedly, as if you were serving the Lord, not people, because you know that the Lord will reward each one for whatever good they do, whether they are slave or free."

Galatians 6:9 "Let us not become weary in doing good, for at the proper time we will reap a harvest if we do not give up."