

Hack: Keeping Contact Info Up-to-Date in Planning Center

Keeping your church's contact information accurate is essential for smooth communication, event coordination, and pastoral care. Planning Center People (PCO) offers several tools to help your team gather and maintain reliable data, without the need for extra spreadsheets or manual tracking.

In this article, we'll walk through a few easy-to-implement systems that will help your church keep contact information fresh and complete throughout the year.

Registration Forms

What it does

Registration forms allow you to collect detailed contact information from individuals the first time they sign up for an event, class, or program.

Who it's for

Any adult engaging in your ministry through events, groups, or forms.

Best Practice

Ensure your forms request the following required fields:

- Full name
- Email address
- Phone number
- Residential address
- Birthdate (including year)

Responses from these forms can automatically update a person's profile, so no extra data entry is required.

Rolling Update Prompts

What it does

Triggers an automated email when someone participates (like checking in for worship) and is missing critical profile information.

Who it's for

People already active in your community, but missing key contact fields.

How it works

A prompt is triggered if:

- The individual checks in for a worship or program event
- They're missing two or more of these: phone, birthdate (with year), address, language, or photo
- They haven't been asked to update in 6+ months, or haven't submitted an update in 12+ months

Custom Field Tracking

This system uses two custom fields in PCO:

- **"Last Asked to Update Info"** — updated automatically when the email prompt list fires
- **"Last Info Update Received"** — updated automatically when the individual completes the form

These custom fields allow the system to track each person's contact history and ensure that reminders are respectful, spaced appropriately, and not redundant.

Failsafe

Your team can manually override or suppress prompts in individual cases when appropriate.

Annual Email Campaign

What it does

Sends a once-a-year check-in to everyone in your database to confirm or update their information.

Who it's for

All active participants and members in your Planning Center People database.

How to run it

- Use your email marketing tool (like Mailchimp or PCO's built-in email)

- Include the person’s current info in the body of the email
- Ask them to confirm or correct using an embedded link to your update form
- Follow up with non-responders 1–2 weeks later

Why it works

Even with great systems, people move, change emails, or update their phone numbers. A yearly “spring cleaning” email helps you catch those updates in a single sweep.

Final Thoughts

When your contact information is up-to-date, everything works better—from pastoral check-ins to emergency notifications to mailers. Planning Center has the tools to make this process largely automatic. A few well-set triggers, custom fields, and annual check-ins can keep your database clean with minimal effort.

Let your data do its job—so you can focus on ministry.

Would you like me to turn this into a markdown template for your documentation or blog system?

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