

Momentum Stewardship Checklist: Protecting the Impact After an Outreach Event

Operational checklist to prevent drop-off and turn one-time service into lasting momentum.

Momentum is perishable. A great outreach event is not the finish line, it is the on-ramp. If contact information is not captured and a next step is not clearly offered, people drift. Fast follow-up signals, You mattered. Slow follow-up signals, We forgot. Use this checklist to lock the system before you are tired.

QUICK SETUP

- Print this and use it in your final planning meeting.
- Assign one owner per section. If everyone owns it, no one owns it.
- Minimum standard: 100% of new guests get a same-day text and next-day email.
- Fix anything unclear 48 hours before the event.

Before the Event: Lock the System

Do this before you are exhausted. Systems beat sincerity.

A. Contact capture is intentional

- ☐ Registration captures at least one real contact method (phone or email) for every participant.
- ☐ Walk-in plan exists: visible QR code plus a staffed option for people who do not want to scan.
- ☐ A simple privacy statement is used: "We will only use this to say thank you and share next steps."
- ☐ New guest indicator is discreet and optional (dot sticker, small mark, or different name tag color).
- ☐ Data export plan is set (who pulls the list, from where, and by what time after the event).

B. Follow-up is written and owned before the event

- ☐ Same-day text is drafted and saved (warm, human, event-specific, under 160 characters).
- ☐ Next-day email is drafted (short recap, one clear next step).
- ☐ Day 5-7 reminder is drafted (light invitation, easy opt-out).
- ☐ Templates cover: invited by a member, came alone, family, civic partner.
- ☐ Follow-up volunteers are assigned (who texts, who emails, who handles personal responses).
- ☐ Tracking method is ready (spreadsheet or form) and one person owns updates.

Before the Event: Lock the System (continued)

Define the next step before people arrive.

C. One clear next step is defined

- ☐ One primary next step is chosen for first-time guests (example: newcomers coffee, next serve, simple lunch).
- ☐ One next step is chosen for regular attenders (example: join a serve team or small group).
- ☐ Closing script is written in plain language and rehearsed (30 seconds, gratitude + clear invitation).
- ☐ Printed or digital next-step card exists (QR code, short link, or handout).

Event Day + First 48 Hours: Steward the Window

Nobody leaves wondering what happens next, and nobody falls through the cracks.

D. Day-of execution (during the event)

- ☐ Guest experience champion is active (watch for stand-alone guests, confusion, awkward moments).
- ☐ Leaders intentionally meet guests and partners (name, thank you, short human connection).
- ☐ Contact capture is checked mid-event (are we actually getting names?).
- ☐ Closing moment includes: thank you, impact highlight, and the one clear next step.
- ☐ Follow-up handoff happens before teardown (who exports the list and when).

E. 48-hour follow-up standard (after the event)

- ☐ Same-day text is sent within 0-6 hours to every guest contact you captured.
- ☐ Next-day email is sent within 12-24 hours with a short recap and one clear next step.
- ☐ Inviters follow up once personally (a quick text or coffee, not five reminders).
- ☐ Day 5-7 reminder is scheduled (light touch, warm invitation, easy opt-out).
- ☐ Follow-up tracking is updated (who was contacted, who replied, who needs a personal touch).

48-Hour Timeline (minimum standard)

When	What happens	Owner
Same day (0-6 hours)	Send Touch 1 text. Thank. Name the impact.	
Next day (12-24 hours)	Send Touch 2 email. Recap + one clear next step.	
Day 5-7	Send Touch 3 reminder or invitation. One follow-up is enough.	

MOMENTUM KILLERS

- Waiting too long to follow up (momentum cools fast).
- Offering too many next steps (choice overload creates drift).
- Mass communication only (people need personal connection, not a blast).
- Vague next step language: "See you sometime" or "Check us out online."
- Collecting contact info without the people to actually follow up.