



Intake-to-Placement: Shelter Foot Traffic Data Tracking

Guide developed as part of the Competitive Pet Placement Project

Why Collect Shelter Foot Traffic Data

Foot traffic data highlights how many people are entering your shelter facility, their primary goal for visiting, whether or not they leave with a pet, and any additional questions that can support improved future customer service interactions. Analyzing shelter foot traffic data will allow your organization to more efficiently schedule staff and volunteers based on trends around highly congested time periods and make strategic decisions for improved pet matchmaking efforts, marketing campaigns, and overall improved customer satisfaction.

Getting Started

Considerations

Consider the following three steps prior to implementing foot traffic data tracking:

- 1. Evaluate existing processes for collecting foot traffic data on visitors at your facility.** If there is already a process in place, consider how it may be enhanced. If not, consider where organizational data is already collected and how that may impact which program or software you utilize to create a check-in survey.
 - a. How is foot traffic information currently collected?
 - b. What type of information is collected?
 - c. Is there an existing database (CRM) that hosts all contact information for individuals interacting with the organization?
- 2. Evaluate current personnel touchpoints with the public.** Make a list of each department or individual that may be impacted by a new check-in process for training purposes. Consider any existing challenges when developing a foot traffic tracking process that works for your existing organizational setup.
 - a. Is there one central point of contact or location, such as a check-in desk or lobby, to pass for everyone entering the facility?
 - b. If there are multiple touchpoints, how does triage currently work to ensure everyone gets to the right place?
 - c. What are the main challenges with this setup?
- 3. Evaluate how the organization currently collects public feedback.**
 - a. Is there a process in place to send experience surveys to individuals who have interacted with the organization?
 - b. Is feedback accepted and utilized in strategic planning?

Creating a Check-In Survey

Surveys may be adjusted to fit organizational needs, restrictions, and requirements. The following outlines a basic check-in survey for foot traffic tracking and can be expanded based on current and future operations. If you are not currently utilizing a CRM or Waitwhile, [Airtable](#), [Google Forms](#),



and [Smartsheet](#) all allow for online survey creation that populates into a tracking sheet mechanism. For this section, we will be utilizing Google Forms as an example.

Utilize the following outline to create survey questions and, where applicable, multiple-choice or free-form responses. Questions are notated below if **required** is preferred for more complete data collection. To create a user-friendly form response, we have included a small form mapping consideration so those who are not here for adoption and foster can skip unnecessary questions.

- **Section 1**
 - Header: Check-In Form
 - Sub-header: Welcome to [ORG NAME]! We look forward to assisting you. Please complete the following form to check-in.
 - First and Last Name (required)
 - Number of people in your party (multiple choice) (required)
 - 1
 - 2
 - 3
 - 4
 - 5
 - 6
 - 7
 - 8
 - 9
 - 10
 - More than 10
 - Reason for visit (required)
 - Interested in adopting a pet
 - Map this form to continue to the second section (outlined below) if this option is selected after section one is completed.
 - Foster a pet
 - Map this form to continue to the second section (outlined below) if this option is selected after section one is completed.
 - Find/reclaim my pet
 - I found a pet
 - Give up my personal pet
 - Return adopted pet
 - Purchase/renew licensing
 - Other
 - **Internal Form Mapping Example:**



Reason for visit: Multiple choice

<input type="radio"/> Interested in adopting a pet	X	Continue to next section
<input type="radio"/> Foster a pet	X	Continue to next section
<input type="radio"/> Find/reclaim my pet	X	Submit form
<input type="radio"/> I found a pet	X	Submit form
<input type="radio"/> Give up my personal pet	X	Submit form
<input type="radio"/> Return adopted pet	X	Submit form
<input type="radio"/> Purchase/renew licensing	X	Submit form
<input type="radio"/> Other...	X	Submit form

- Email Address (not required)
 - Sub-header: *We're interested in gathering feedback about your experience today. Please enter your email address below to receive a follow-up survey. Email addresses will not be sold, shared, or used for any other purpose.*
- Zip Code of Home Address (not required)
 - Sub-header: *By gathering this information, we aim to enhance our services and support for both pets and people in our community.*
- How did you hear about us? (required) - Multiple choice
 - Social media
 - Word of mouth
 - Google/internet search
 - I already knew about the shelter
 - I've adopted or fostered a pet previously
 - Other
- **Form may be submitted if the person did not select options one or two in reason for visit.**
- Section 2
 - Header: Animal Details
 - Subheader: Please describe the animal you are interested in adopting/fostering.
 - Species - Multiple choice (required)
 - Dog
 - Cat
 - Other
 - Name of animal or description (if known) (not required)



- Freeform answer
- **Form may be submitted**

Survey Visibility and Triage

Once the check-in survey has been developed, consider how you can ensure the survey link is accessible by individuals visiting the shelter facility. Having the survey link posted in multiple locations and clear directions to the main triage point will help direct support and ensure everyone entering your facility feels confident in the next steps they should take. If there are multiple entrances, consider cross-training and creating tip sheets for personnel with a map and high-level details about how to access different program focus areas for the public.

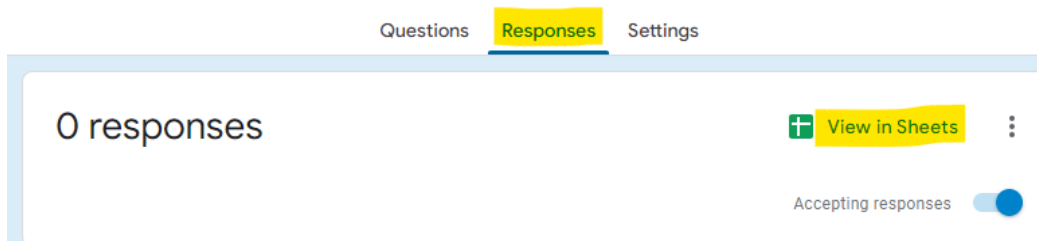
- [Check-in sign with QR code](#) (English and Spanish versions)
 - Utilize this template to post the check-in survey in high-traffic areas and the entrance, both indoors and outdoors. Consider utilizing a [sandwich board](#) for increased visibility. Individuals who cannot or do not wish to use QR codes can be supported directly by the personnel at the entrance.
- [Check-in poster](#)
 - If the facility's main triage point is not immediately viewable upon entry, consider enhancing signage directing visitors where to check in.

Check-In Survey Responses

Web-Based Survey Creation Applications

[Airtable](#), [Google Forms](#), and [Smartsheet](#) all allow for online survey creation that populates into a tracking sheet mechanism. For this section, we will be utilizing Google Forms as an example.

If a check-in survey has been developed in a live application such as Google Forms, you may create a response spreadsheet as soon as the form has been finalized. This sheet will be a living document that can be edited by anyone the organization gives access to. **Avoid creating the response sheet if edits are ongoing to ensure column headers and overall setup do not change.** To create the response sheet in Google Forms, navigate to the “responses” tab and select “view in sheets”. This tab is also where you can ensure settings are updated according to your organization's policy.





Once the response sheet has been created, manually add columns to track which customers have been served and whether or not they left with a pet. **This is a critical step** in ensuring the organization collects foot traffic accurately.

Creating drop-down menus of common options individuals may leave without a pet can support more consistent data entry and make this a quick step in the process. Beneficial columns to add in the response sheet include:

- Customer served (checkbox)
- Time customer served (if available, make this an automatic time stamp when customer serviced is checked)
- Did this person leave with a pet? (Dropdown)
 - Yes
 - No
- If no, why not? (Dropdown)
 - Animal not ready; placed on hold
 - Cost of adoption/high fees
 - Seeking young animal (puppy, kitten, etc.)
 - Seeking specific breed
 - Seeking specific size
 - Seeking pet compatible with other pets
 - Seeking pet compatible with children
 - Seeking pet compatible with energy/lifestyle
 - Seeking pet with known history/background
 - Seeking pet with medical/health needs compatible with lifestyle
 - Seeking pet with behavior/training needs compatible with lifestyle
 - Still making decision/many choices
 - Just browsing/visiting with no intent to take a pet home
 - Other (See Notes)
- If “other” selected, describe:

Create a visible separator line between the columns that will auto-fill information and the columns that will be filled by personnel for ease. Locking the auto-filled columns may be beneficial to ensure consistency. [Here is a sample spreadsheet highlighting the above recommendations](#). For ease of use, “hide” all rows at the end of each day so the next morning the queue will look empty but historical data will still be available to reference and analyze. This should be the responsibility of one individual to reduce risk of accidental deletion.



Waitwhile

For organizations that already utilize [Waitwhile](#) to triage client interactions, you are able to directly update the current survey questions asked without requiring public-facing links or QR codes to be reset. Two new questions can easily be added to the “person tile” for complete data entry, “Did this person leave with a pet?” and “If no, why not?” with dropdowns as outlined in survey responses above.

CRM Integration

For organizations that have an established CRM or email-based communication software, a survey development option may already be integrated into the service. Locate your ‘help’ or ‘knowledge base’ section of the platform and search the keyword “survey” to determine if they already have an existing how-to guide. By creating this check-in form within an existing CRM, the organization will need to ensure that all personnel responsible for assisting the public and may be responsible for adding response notes (whether someone left with a pet, whether someone was served) may require an account and edit access to the CRM if they do not already have it. You may use the basic check-in form setup above as a base for your survey creation. Here are a couple examples of CRM survey creators for [HubSpot](#) and [Mailchimp](#).

Customer Experience Survey

Form Setup

This survey may be used for two primary purposes: filling in data collection gaps for individuals who did **not** leave with a pet to identify **why** and use experience responses to enhance customer service efforts at the organization. Utilize the following outline to create survey questions and, where applicable, multiple choice or freeform responses. This survey may be built in online-based form creators or existing CRM platforms. Questions are notated below if **required** is preferred for more complete data collection. To create a more user-friendly form response, we have included form mapping considerations.

- **Section 1**
 - Header: Customer Experience Survey
 - Subheader: Thank you for your recent visit to [SHELTER]! We invite you to take part in this survey to **share your experience** during your most recent visit to the shelter. Your feedback is instrumental in helping us make improvements and ensure we're meeting the needs of pets and people in our community. The survey is designed to be quick and easy, taking just a few minutes of your time.
 - Email Address (required)
 - Reason for visit (required)
 - Interested in adopting a pet



HUMAN ANIMAL SUPPORT SERVICES

- Map this form to continue to the second section (outlined below) if this option is selected after section one is completed.
- Foster a pet
 - Map this form to continue to the second section (outlined below) if this option is selected after section one is completed.

What was the reason for your visit?			Multiple choice
<input type="radio"/> Adopt a pet	×	Go to section 2	▼
<input type="radio"/> Foster a pet	×	Go to section 2	▼
<input type="radio"/> Find/reclaim my pet	×	Go to section 5	▼
<input type="radio"/> I found a pet	×	Go to section 5	▼
<input type="radio"/> Give up my personal pet	×	Go to section 5	▼
<input type="radio"/> Return adopted pet	×	Go to section 5	▼
<input type="radio"/> Purchase/renew licensing	×	Go to section 5	▼
<input type="radio"/> Other...	×	Go to section 5	▼

- *All responses after this point may be mapped to immediately skip to section five*
- Find/reclaim my pet
- I found a pet
- Give up my personal pet
- Return adopted pet
- Purchase/renew licensing
- Other

- **Section 2**

- How many pets did you meet during your visit? (multiple choice) (required)
 - 0
 - 1
 - 2
 - 3
 - 4
 - 5+
- Did you leave with a pet? (required)
 - Yes
 - Navigate to section **three**
 - No
 - Navigate to section **four**



- **Section 3**
 - Select what best describes your experience about leaving the shelter with a pet: (multiple choice) (required)
 - I adopted a pet
 - I am fostering with the intent to adopt
 - I am fostering as a volunteer for the shelter
 - Did you come to the shelter with a specific pet in mind? (multiple choice) (required)
 - Yes, and I adopted that pet
 - Yes, but I adopted a different pet
 - Yes, and I fostered that pet
 - Yes, but I fostered a different pet
 - No, I did not have a specific pet in mind
 - Did our team make recommendations about pets to adopt/foster during your visit? (multiple choice) (required)
 - Yes
 - No
- **Section 4**
 - Select all that apply to describe why you did not leave the shelter with a pet: (select all that apply) (required)
 - Long wait times to meet a pet
 - Long process to adopt/foster a pet
 - Animal not ready; placed on hold
 - Cost of adoption/high fees
 - Customer service experience
 - Seeking young animal (puppy, kitten, etc.)
 - Seeking specific breed
 - Seeking specific size
 - Seeking pet compatible with other pets
 - Seeking pet compatible with children
 - Seeking pet compatible with energy/lifestyle
 - Seeking pet with known history/background
 - Seeking pet with medical/health needs compatible with my lifestyle
 - Seeking pet with behavior/training needs compatible with my lifestyle
 - Still making decision/many choices
 - Just browsing/visiting with no intent to take a pet home
 - Other
 - Of the reasons you selected, what was the main reason why you did not leave the shelter with a pet? (multiple choice) (required)
 - **Same responses as above**
- **Section 5**



- On a scale of “very negative” to “very positive,” how would you rate your experience at the shelter? (required)
 - Scale with selection options at 1 through 5
 - Clarify 1 as “very negative”
 - Clarify 5 as “very positive”
- What made your experience like that (*above*)? (required)
 - Freeform response
- On a scale of “not knowledgeable at all” to “very knowledgeable,” how would you describe our team? (required)
 - Scale with selection options at 1 through 5
 - Clarify 1 as “not knowledgeable at all”
 - Clarify 5 as “very knowledgeable”
- What can our team do to improve? (required)
 - Freeform response
- Please share any additional comments on your experience at the shelter: (not required)
 - Freeform response

Form Distribution

The client experience survey will ideally be sent to all individuals utilizing the check-in survey. A direct link to this form may be sent automatically through an existing CRM, development of code directly in forms with programs like [Google App Scripts](#), or can be manually sent at the end of each day to every person who provided an email or phone number in the check-in survey.

Tip: If manually sending a link to this survey, ensure all individuals are BCC'd in email for privacy.

Sample email copy:

“Thank you for visiting [ORGANIZATION]. We would like to give you the opportunity to fill out a quick survey about your experience with us. Your feedback is instrumental in helping us make improvements and ensure we're meeting the needs of pets and people in our community.”

Advanced Considerations

Pet Support Tracking

For organizations that provide a wide variety of pet support options, consider integrating pet support tracking into the check-in survey responses. You may add “pet support” as a reason for visit and monitor the “other” responses that enter the queue. To track pet support provided in a comprehensive way, consider adding additional columns to check-in survey response sheet specifically to be filled out by personnel. Sample columns may include the # of pets that received support, the result of the interaction and types of services provided as a simple checkbox when



fulfilled. This process will begin putting numbers to intake deferrals and services provided to the public to better support expansion of these programs and future strategy.

Here are a few examples:

Behavior/train	Com Cat TNR	Finance assist	Food	Human services referral	Lost/found pet resources	Self-rehoming	S/N Referral	Supplies	Vet referral	Other
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# dogs	# puppies	# cats	# kittens	# other pets	# wildlife	Result
						<input type="text"/> <ul style="list-style-type: none"> Will foster stray pet(s) for limited time Will foster stray pet(s) indefinitely

Auto-Responses

Integrating automatic responses when check-in surveys are submitted can support community members especially if the shelter facility is large or complex to navigate. Consider creating a script highlighting where to find specific services, how to access public pet viewing areas, and where to go for help. If possible, include a map! This process can improve overall customer satisfaction.

Advanced Statuses

The basic check-in survey response sheet can be expanded to include status changes for organizations that wish to use this process for advanced triage. You may include in progress, not present, awaiting assistance, not present, or other status variables that may be relevant. Including a department column can be helpful in ensuring the queue is easy to navigate if multiple departments may be updating statuses simultaneously. Consider adding a column for initials if tracking who worked with which client is beneficial.

Tip: If utilizing statuses in the queue, consider adding conditional formatting to the spreadsheet so that “complete” status lines go grey and are easier to identify individuals still requiring assistance.

Department
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>