Manage Your Contacts to Thrive

Your contacts are the lifeblood of your business. Learn how to manage them to increase efficiency, productivity and revenue.

19 Oaks
Strategic Sales & Marketing

Contents

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Introduction

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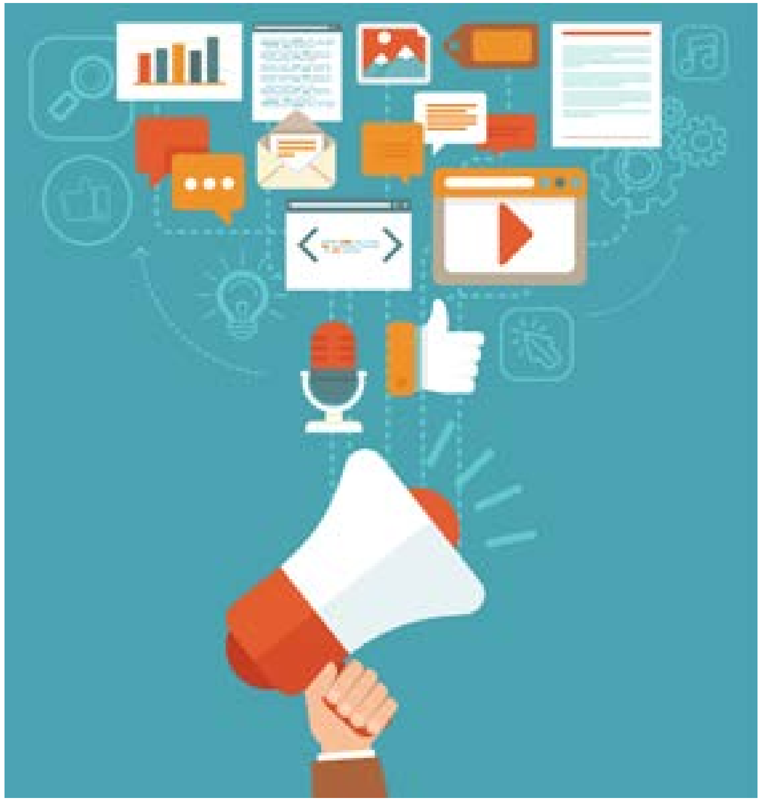

Your marketing and sales efforts are only as strong as your contacts.

You may have a crack team of brilliant creatives, a fantastically useful product, and a sales package that's too good to refuse—but if you're not talking to the right people, it's all for naught. Your content will fall flat, your product will fail to move, and your salespeople will go on to find higher commissions. To avoid this fate, you must take the time to get your contacts in order, and you must schedule regular maintenance for your lists. Yes, list maintenance is tedious, but it's not hard—and we have a foolproof system to share with you.

Get started on the right foot

Most businesses have a marketing and sales strategy to drive business development. A good plan will do a few things: First, it will help you stay top of mind with your existing customers and help maintain your relationships. Second, it will help you target new customers and start forming relationships. And third, it will keep you engaged with your referral sources.

If you're lucky, you already have an amazing Strategic Sales & Marketing Playbook in place. But that's only half the battle. The strength and potential of

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your playbook and content calendar hinge entirely on your lists of customers, prospects, and referral sources. So the second half of the battle is organizing and maintaining your contact lists.

While that sounds fairly straightforward, it is one of the hardest things for businesses to do. Your contacts are often in many systems—financial (billing system), sales (CRM), and marketing (email programs, address books, website forms, direct mail list databases).

Even when you get the contacts pulled together, you will have some that are outdated, incorrect or unhelpful. For example, B2B businesses often have low-level contacts at other companies, such as admin or bookkeeping staff. While talking to the bookkeeper may be helpful in some situations, you ultimately want to communicate with the decision-maker or end-user—the individual who can take action.

So what's a business to do? Read on to discover our 7-step solution to managing your contacts and increasing the strength of your communications plan.

Case Study

An established, 50-year-old non-profit had a direct mailing list that they used for an annual event. It had not been reviewed in 12 years. 19 Oaks scrubbed the list and saved the client $1,000 on unnecessary mailings.

Step One:

Set Your Goals

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You need to fully develop and understand your goals before moving forward. Once you have determined your goals, it's much easier to look at your contacts and decide what to do with them. So, ask yourself: *What results do I want from my marketing and sales efforts?* Be as specific as possible about your goals, so you have clear metrics for success. For example, if you're looking for new customers, how many do you want, and in what timeframe?

Examples of goals that may be important to your business:

- Create a customer service experience ranking and then monitor it for improvement
- Promote customer awareness of products and services
- Create value for customers leading to additional sales
- Improve referral sources to get new business
- Improve brand, product and service awareness for new customers
- Increase the number of qualified contacts in your system
- Increase the number of customers
- Decrease number of contacts in lists by eliminating any unqualified contacts
- Drive traffic to a store or website for sales

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Step Two:

Aggregate Your Contacts

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Once you have set your goals, you're ready to start working with your contacts' information. The first thing to do is to identify where and how the information is being stored. Many businesses store their contacts in a variety of platforms, such as QuickBooks, SalesForce and email. It is important to find and export all of your contacts' information into one central list.

Make sure to check:

- Billing systems
- CRM
- Email program(s)
- Survey program(s)
- Address book(s)
- Website form submissions
- Direct mail list databases
- Social media accounts

Each program will have a way to export your information into an Excel spreadsheet. Compile all your information into one spreadsheet for easy sorting.

CRM Tip

Movement: Make sure your contacts are moving through your sales funnel. Monitor to see where people are getting stuck and/or dropping off. Review your process to make sure something isn't getting in their way.

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Step Three:

Determine Your Variables

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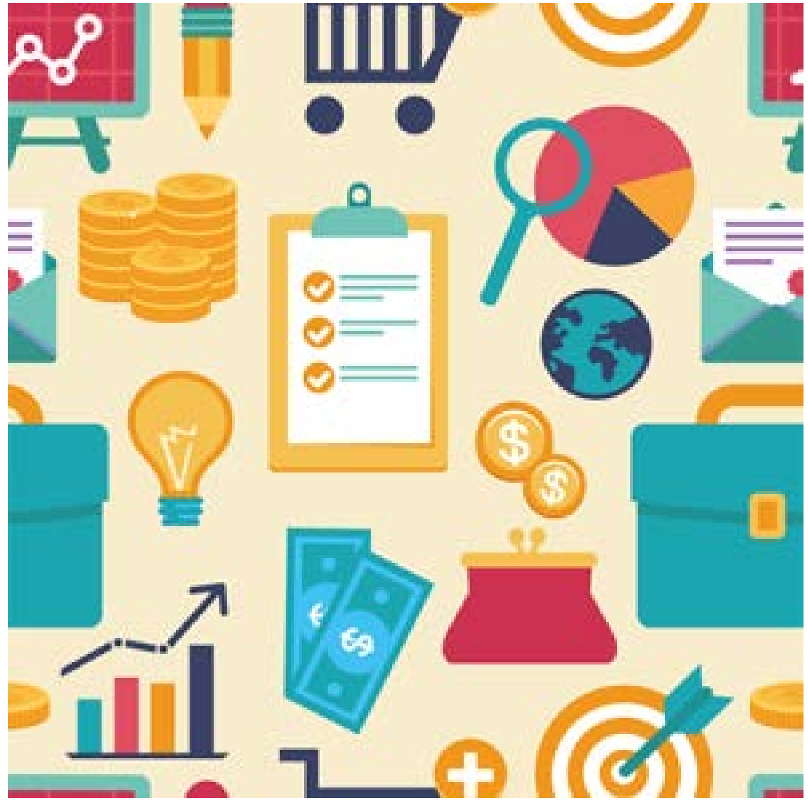

"Variables" is a fancy word for the different types of information you have collected, or will collect. For example, "First Name" is a variable, as is "Zip Code." The variables you include in your list should be determined by the goals you set for your marketing and sales efforts.

Commonly used variables:

- **First Name:** Remember to separate First Name and Last Name when entering them into a spreadsheet so you can easily import them into other databases later on.
- **Last Name**
- **Company Name**
- **Mailing Address:** Like with names, it is important to break down address components for a simple database import. This also helps when you want to communicate with people in a specific geographic area.
- **City**
- **State**
- **Zip**
- **Website:** Great for B2B businesses who want to know more about their customers.

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- **Email:** This is *the* critical component of your contacts. Email marketing is still highly effective, and you need an email address to add the contact to social media accounts or to track activity in your web analytics.
- **Phone Number:** Only necessary if your strategy includes calling the contact (for your sales or service staff for example).
- **Time Zone:** Again, this is only important if you plan on calling your contacts.
- **Became a Customer Date:** This is important because it will help you tailor your communication with customers based on how long they have been with you.
- **Products/Services Purchased:** You will also want to tailor communication with customers based on what they have purchased or what they haven't (this will help if your goal is to upsell).
- **Lifecycle:** This is how you categorize each contact. Typically, you will file each contact as one of the following: Customer, Referral Source, Prospect, or Past Customer.
- **Customer Profile:** These are the "personas" that your buyers fit into. For example, an outerwear company could have personas that include "avid hiker," "family day tripper," and "environmentally conscious millennial." Dividing contacts into personas will help you figure out their needs and pain points and allow you to sell more effectively.
- **Referral Source:** How did this contact hear about you? If you got a lot of customers from a vendor or an event, you may want to know this when communicating with them.
- **Lifetime Value:** You may want to talk to your most valuable customers differently than brand-new customers or prospects
- **Industry:** Important for B2B customers. Even if you have profiles set up, this is another handy way to customize your communications. However, if you do not have profiles, this information might be enough for you to communicate based on the industry they're in.
- **Classification:** You may want to classify your customers based on the divisions of your company. For example, a customer may only buy your children's products and never anything from the adult side of your business.

Social Media Tips

- Make sure you are following or have liked the social pages of your affiliates, referral sources, customers, and evangelists.
- Keep your ratio of Followers vs. Following close to 1.0.
- Unfollow inactive users.

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Step Four:

Scrub Your List

Step Four: Scrub Your List

This is the most tedious and time-consuming part of the process. However, it is also the most important. This is where you really start to impact the health of your contact list by removing outdated and incorrect information. Remember, it's not the size of your lists that matter, it's the quality of your contacts. There is no value in talking to people who aren't listening. Sort your list by either first name, last name, or company name—whatever makes the most sense for you—and start deleting and merging duplicates.

Things to note:

1. **Sort your list** by either first name, last name, or company name—whatever makes the most sense for you—and start deleting and merging duplicates.
   a. Make sure you merge as much information as possible into one contact.
   b. Take the most recent information—check your sources and, if possible, determine which entry is the most recent.
2. **Delete variables** (columns) that are not applicable to your needs. If you have variables that you will not use to communicate, go ahead and delete all of those columns.

3. **Start filling in the blanks.**
   a. Sort variable by variable so you can see clusters of information and hopefully fill in multiple empty cells at once.
   b. Some variables will determine other variables—for example, if all customers in Zip Code 12345 have XYZ Services, you can fill that in quickly.
   c. Work with the people that input the original data (finance, sales, marketing, service) and see if they can help you fill in the missing cells in clusters. A best practice here is to schedule ½ hour to an hour with the department head to go through the list.
      i. Start by explaining the purpose of the list.
      ii. Review the variables of the list.
      iii. Sort by variable and see if they can help you fill in missing columns in chunks.
      iv. Give them homework—ask if they can get the missing information for you.
      v. Schedule a follow up meeting time to collect the information from them.
   d. When you have gone as far as you can with the list and you find that you still have some missing information, you can push on with a fee-based service.
      i. B2B companies have the option of using a database management company like Dun & Bradstreet to get missing information. These companies specialize in data collection and analysis and can give you insight into industry-wide trends and sales figures.
      ii. B2C businesses can use Sales Genie to find targeted sales leads.

Case Study

An established business of 25 years moved their lists into an automation system and saw a severe decrease in sales. After investigation, 19 Oaks discovered that the lists had not been scrubbed and they were not talking to existing customers or qualified customers.

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Step Five:

Upload to Platforms

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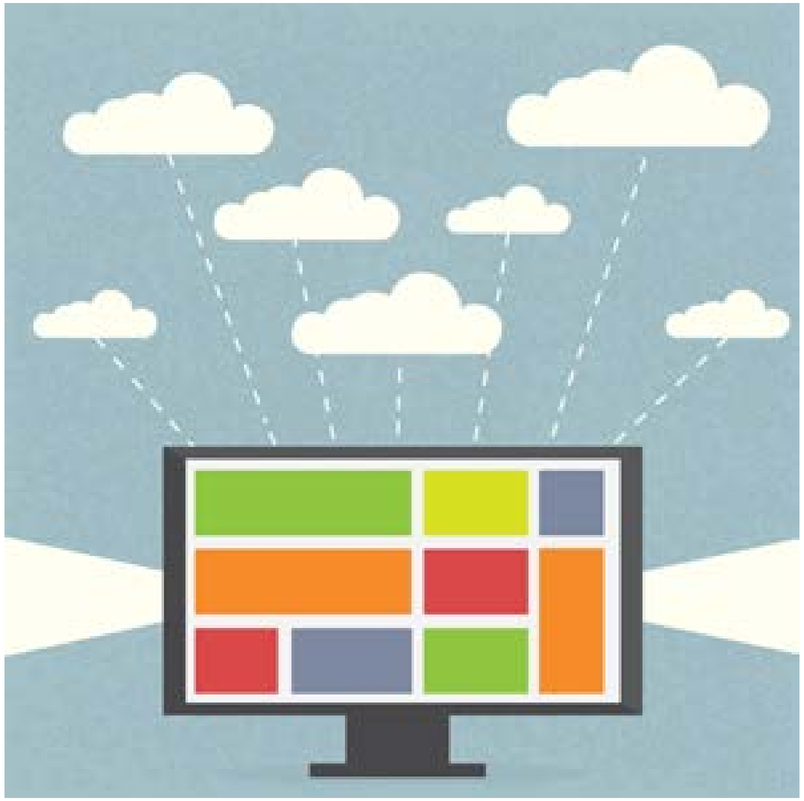

Before you finalize your list, make sure you match your variables. Different platforms may use different variables, so make sure that the ones in your spreadsheet and the system you will be using have the same name for each. For example you might have "Street" while the system has "Address." If they don't align, your information won't be captured by the system. When you're satisfied with your list, save your Excel spreadsheet as a ".csv" file. CSV stands for "comma separated values", and allows the data to be saved in a table-structured format. This format is used by many databases, so saving this way helps to ensure that your data can be read and uploaded properly by the platform that you choose.

Platforms you may be using for Sales & Marketing:

- **Email:** iContact, Constant Contact, Mail Chimp
- **Survey:** Survey Monkey, Zoomerang, SurveyGizmo
- **CRM:** SalesForce, Infusion Soft, Insightly
- **Social Media:** LinkedIn, Twitter, Facebook, Google+, Instagram
- **Direct Mail:** Modern Postcard, PrintingForLess, PrintLabel&Mail
- **Automation Platform:** HubSpot, Marketo, QuickSprout

Direct Mail Tips

- **Acquisition:** It is important to understand where your list came from. You want the list to match the CTAs you are sending to your contacts.
- **Returned mail:** Like bounced email, this is an indication that your contact has moved. If you can't find updated contact info for a customer, remove them from your list.
- **Last Purchase:** Establish a policy for when to remove contacts to avoid costly mailings to people who will never buy.

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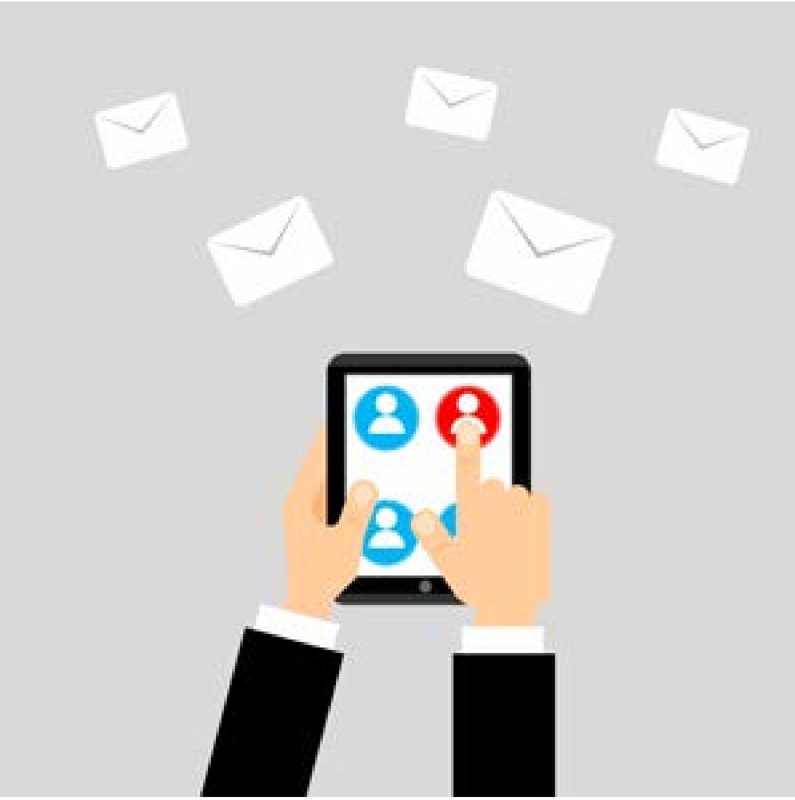
Step Six:

Segment Your Contacts

Step Six: Segment Your Contacts



Not all of your contacts will be interested in the same information. Segment your master contact list into targeted lists to provide contacts with content that is relevant to them. When segmenting, ask yourself: *Which variables do I need to consider when creating specific groups to talk to?*

Break your contacts into segments that will help you achieve your marketing and sales goals based on the types of customers you have.

Here are some variables to review:

- Location
- Lifetime Value
- Life Cycle
- Services Purchased
- Upsell Opportunity
- Education (for moving them through the sales cycle)

Once you have segmented your contacts, go back to your Marketing and Sales Playbook and determine the best frequency of communication by platform.

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Step Seven:

Maintain Your Lists

Step Seven: Maintain Your Lists

Set up a process for maintaining your contact lists (and make sure to train and review the process with employees as often as you think is necessary). If you can, assign the task of maintaining the contacts to someone who already understands the process. It is also a good idea to create an outline that explains the different variables and why they are important. Make sure to explain where the contact information will be collected, and which platforms the information needs to be uploaded to. This outline will be especially helpful if you need to bring in someone new to collect the contact information.

Routine maintenance tips:

- **Check bounced emails:** Your bounce rate could indicate that people have moved to a new company or are no longer in business. *Follow through to:*
  - Get the correct new contact.
  - Follow the current contact to his or her new company or position. This could be an opportunity for new business.
- **Opt-outs:** If a contact has opted out of email communication, delete their information from your database.

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Conclusion

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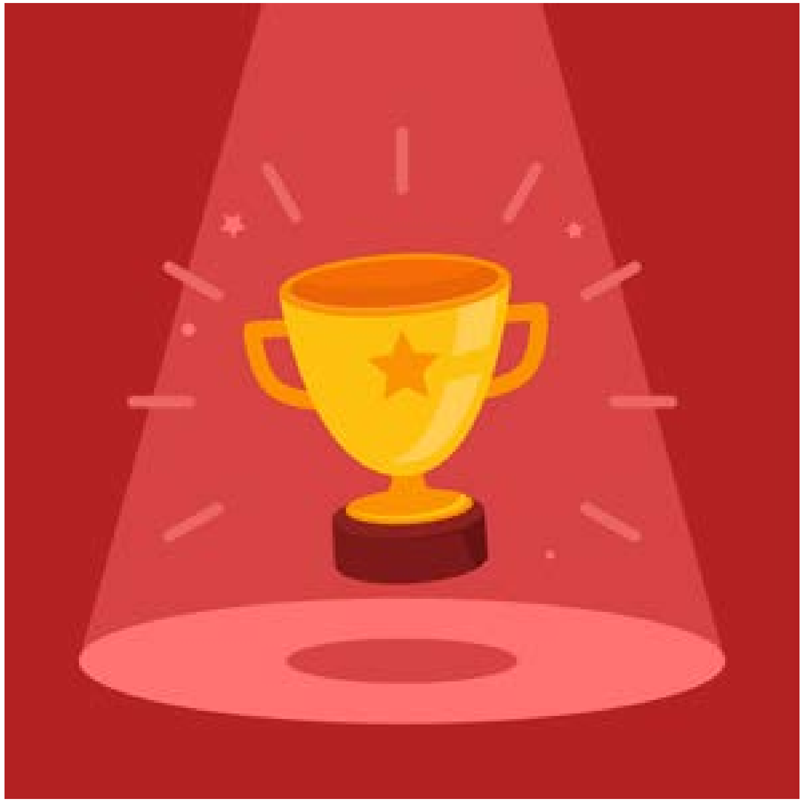

Your contact lists are the foundation of your marketing and sales efforts.
Building and maintaining your contacts is a process that will never really be completed. Because of their dynamic nature, the contact lists you created last week (or even yesterday) may be outdated today. Meanwhile, keeping your contacts as current as possible is essential to growing your business. In fact, it can mean the difference between success and failure.

The good news is, effective list maintenance only requires two things: A good process, and discipline. Now that you have the process, schedule time for regular list maintenance—and make sure you stick to it. You'll end up learning a lot about your customers, prospects and referral sources, including the types of communication they respond best to (and which to avoid). Your marketing and sales messages will be stronger as a result, leading to a solid and sustainable future for your business.

About 19 Oaks

19 Oaks is a marketing and sales company based in Portland, Maine, and working with clients everywhere. We deliver a sustainable approach to business growth that unites your sales and marketing efforts around a central goal. Our services include: marketing strategy, content creation, website development, sales integration and data management.

To inquire about this guide, or to discuss your business growth strategy, please contact us today.