

Legal Technology Primer

Contact Management Software Makes You Seem Like Everyone's Best Friend

Everywhere I turn lately I see articles on how lawyers need to improve their marketing efforts. In an increasing competitive environment, it seems that lawyers must concentrate on bringing in and developing business at least as much as they do on actually doing legal work. How can technology assist you in business development?

In simplest terms, successful marketing depends on frequent contact with clients and potential clients. Some experts even argue it's the quantity of contacts, even more so than the quality of contacts, that will make your marketing efforts successful. Recent versions of a type of program called a "contact manager" can assist a busy lawyer in managing both his work with clients and his contacts with potential clients.

Contact managers are supercharged electronic address books with added features which allow you to record historical contact information (sometimes automatically), keep notes, produce correspondence, perform powerful searches on information kept in the underlying database, and organize information on people in helpful and productive ways.

A contact manager is different from the more commonly known personal information manager ("PIM"). A contact manager offers most of the PIM features (calendar, scheduling), but adds specialized features, searching and sorting functions and, most important, the capacity to produce a historical record of contacts. Using a contact manager, you can record notes and track each communication with an individual or entity, whether it is a letter, phone call, fax, personal contact, or e-mail. You can then view the history of your contacts along with any contemporaneous notes that you might have made, letters, e-mail and phone call summaries. Because the contact manager offers you the ability to organize and search this historical information, it offers some exciting ways to use this information to your advantage.

Like many of you, I suspect, I have a tendency to collect a drawer full of business cards from people I meet. Sometimes I will make a note about the person on his or her business card, but often I do not. Two problems arise. First, I'll look at the card later and simply not remember the person. Second, I'll remember the person but will not be able to understand the note that I made to myself. For example, I have a business card currently in my desk drawer on which I wrote "nursing home". I think that I meant that the person could give me recommendations of good nursing homes, not that the person was in a nursing home.

Using a contact manager, you can enter traditional "address book" information or even import the information from your current electronic rolodex or PIM. You can then add personal information, such as names of children, hobbies, and the like, or business information, such as specialty areas, products sold or special expertise. Typically, contact managers allow you to enter information into pre-set fields and allow you to modify or add fields. Later, you can do key word searches and find each individual for whom you have entered information about the key word. For example, you have some extra tickets for a baseball game. You run a search on the word "baseball" and the contact manager will provide a list of names of people you have noted as liking baseball. A quick look at this list may reveal a potential client or a current client who needs a little more attention for you to invite to the baseball game or to whom you might offer the tickets.

Of more importance than the search function, and the key to the value of contact management software, is the historical function.

Contact management software allows you to keep a record of each contact you make with any individual or entity and to show on your computer screen a record of that history. The newer versions of contact managers, in particular, can also provide an automated historical logging of phone calls and e-mail. The

value of this information to you is obvious. How long has it been since you last talked to a person or promised to send her information? When did that transmittal letter with documents go out? What did you talk about in that phone call two weeks ago?

You can begin to see that a contact manager may be valuable to you simply as a memory enhancer, or, in more extreme cases, as a substitute for failing memory.

Contact managers come with a large number of the most commonly used fields already set up for you and also give you many ways to customize the program to best fit your needs. The newest versions are easy to use and extremely powerful.

Here are five examples of other things you can do with a contact manager:

1. Make calls, send faxes and send e-mail directly through the contact management software. A contact manager also provides a way to keep a record of and organize faxes and e-mail. These records can also be very helpful in assisting you in timekeeping.

2. Find someone's web page, click on it and open your browser, and go directly to that web page. A fun feature now, but soon this will be a very handy feature as the Internet becomes even more universal and important.

3. Scan in letters, resumes and other materials and directly attach it to the individual listing for a person in the contact management software. For example, if you are involved in hiring, you can look up a person and review a scanned copy of their resume at any time you wish. You can even scan a person's picture and attach it to his or her contact manager file.

4. Break down your address book by categories into leads, potential clients, potential referrals and experts. Organization of people into groups is an important function that contact managers provide. You might print out a list of every client for whom you have done a will or a list of potential golfing partners. You can produce charts and graphs to show you information like what clients provide the most revenues or referrals, clients by geographical areas or sources and other potential useful marketing information.

5. Prevent the neglect of clients by routinely looking at clients that you have not been in touch with for six months or a year. Contact managers allow you to produce all kinds of useful, customizable reports.

In a law firm setting, contact management software is also very attractive because contact information can be shared by everyone on your network. As different people in your office have contact with different clients and add information about the clients, the contact management system can become a true knowledge base providing much useful information for both client service and marketing. Today's contact managers are designed for network use and offer the ability to provide automatic logging of contacts to show you who made what contact when. Contact managers also will also do group scheduling and calendaring.

Contact management software has now improved to the point where the programs can do some pretty amazing things. My favorite example is that some of the programs can take advantage of caller ID and, if properly configured, the program will recognize a caller's number and pop up a screen with information on the caller as you are answering the phone. Instead of ad libbing while you try to remember who the caller is, you will have a screen full of information about that person and about the contacts you have had with him or her at your fingertips as you answer the phone. The difference in the perception of your preparedness is enormous.

Contact managers were primarily developed for and grew out of the sales industry. I have not found that contact managers are being marketed aggressively to attorneys, but I strongly believe that this software can be adapted to the practice of law and used very effectively by lawyers.

Contact management software offers exciting possibilities for making you more productive and improving both client relations and marketing efforts. Making effective use of the contacts you make is vital to the development of your practice. There are more important programs than word processors to consider as you upgrade your technology. Contact management software is one example. Obtaining one of these programs, learning how to use it effectively and making good use of it can result in significant, tangible benefits to your practice and your bottom line.