

Why Do I Need Contact Management Software?

Introduction

Life is getting more complicated. There was a time when all you needed was a phone number and street address to keep in touch with your friends and business contacts. Today you need their home and business street addresses, multiple office and home office phone numbers, pager numbers, cell phone numbers, fax numbers, email and web page addresses. And have you noticed that you never talk to people anymore? You leave a voice mail and get a voice mail in response. It's ironic, but it seems that the more conveniences we have, the more complicated our lives become.

A Simple Solution

The solution is simple: contact management software, which stores all these addresses and phone numbers and puts all these numbers to work. A good contact manager sends faxes, mail merges letters, dials your phone, launches web pages, and sends email, receives email, and reminds you to be on time for meetings.

Features of a Contact Manager

In addition, contact management software makes it easy to enter, retrieve, sort, print, fax, and email information. When calling a contact, how many times have you wished you had kept notes about your last conversation? Wouldn't your client be impressed if you remembered the story he told several months ago about his ski trip, and his knee operation? Relationships are built around these types of details. It shows you cared enough to remember, or at least file it away in your contact manager.

This software makes it easy to enter and retrieve notes about each phone conversation and meetings. If you have hundreds or even thousands of contacts in your database, it's easy to find someone by a single word or phrase. Have you ever forgotten an important person's name, but remembered some details about the conversation you had? Well, if you put in a few keywords such as "discussed liability insurance" in the memo section, you can do a keyword search for "liability insurance" and retrieve that person's contact record in seconds.

At the heart of a contact manager are the user defined fields which give you the ability to customize the database to suit your business or personal needs. Contact managers can be used by almost everyone, but especially insurance agents, salesmen, real estate agents, and organizations such as churches, clubs, charities, and schools. They use it to keep track of their members and customers, and to organize their schedules. It's easy to change field titles (the name of the area where you store information). You can change a field title to "Secretary", so you have a place to store the name of the executive's gatekeeper. Name another "Birthday", so you can send a card on the appropriate day. It also might be wise to name another field "Spouse's Name", so you can ask about her/him by name. In most cases all you have to do is right click on a field to change the field title. Then click on the field to the right of the field title to enter the data.

One of the best things about a contact manager is the alarms. Even if you are in another program, the alarm will remind you to do things on time. You'll never miss another appointment or forget to make that important phone call. When someone says, call me in three weeks about a new product, you won't forget, if you use a contact manager. And wouldn't your rich aunt Gertrude be impressed if you remembered to call her on her eightieth birthday?

Have you ever wished you could see a list of all of the contacts that have a relationship with one of your key customers? You can create a list of the contact affiliated or associated with a contact: his CPA, attorney, banker, key suppliers, close friends, or company associates.

Another nice feature is the ability to create a customized sequence of scheduled events. For example, you can set a reminder to send a letter to a new contact, make a call a week later, and send a fax a month after that. A good contact manager will let you customize a schedule so you can schedule all of these events with one click.

Easily Retrieve Information

A few contact managers make it easy to get information out of your computer. Have you ever been driving down the freeway and wished you had the information in your computer: key phone numbers, addresses, or the time of your next appointment? Next time, before leaving the office, just click on the hot sheet icon and get a one page printout with a list of everyone you need to call, every meeting, and every to do. Fold it up and stick it in your pocket or purse. While talking on the phone, print a new hot sheet everyday, and leave them on your desk, in your car and by your home phone. It just takes a single click. It's handier than a PalmPilot, but not as much fun.

Palmtop Computing

Some contact managers work with the PalmPilot, a hand held electronic device which is a little larger than a deck of cards. PalmPilots store addresses, schedules and a prioritized to-do list. It is easy to synchronize the addresses and appointments in your contact manager with your PalmPilot so you can take most of the contact information with you.

While at lunch use the PalmPilot's handwriting tool to schedule a meeting in two weeks, add to your list of to-do's, or enter a new contact. When you get back to the office, simply place your PalmPilot in a cradle attached to your computer, press a button, and send the new information to your contact manager. If your secretary added a meeting to your schedule while you were out, you can also synchronize the information in your contact manager with your PalmPilot.

Further Contact Management Software Features

A neat feature is the Image Library which allows you to link an unlimited number of pictures, maps, or scanned documents to a contact record. Put in the person's picture, or scan a key contract which you can pop up while on the person's record.

Most contact managers allow you to mail merge letters, faxes, or email messages. This can be useful if you want to send a new product notice to customers, or notify PTA members about a special event.

It is also possible to print labels of any size, and some even print a one page sheet with your appointments for the day, all your to do's, and the "important" phone calls you must make.

Another great thing about a contact manager is its ability to print a customized phone book. Don't panic if you misplace or lose your address book. In minutes you can print out a new address book of just your golfing buddies, key clients, or PTA members. Keep a separate one for each group. In addition, you can select the information you want in the address book. For example, print all the phone numbers, email address and web page. You can also print the list by company name or contact name.

Example of Address book Printout:

ABC Commercial Real Estate
Fred Smith
Suite 1000
1234 Executive Drive
San Diego, Ca. 92127

Birthday: 04/29
Secretary: Susan McDougal

Office: 555-555-1234
Fax: 555-555-5678
Home: 555-555-1111
Cell: 555-555-6543
Pager: 555-555-0987
Email ID: fsmith@email.com
Website: www.six-sigma-crm.com

Integrating With Email

The best contact managers work with email. They file email messages in the contact's History file along with all the meetings and letters, and faxes sent. A contact manager should automatically create a new contact record when you receive an email from a new contact. Make sure that the contact manager you chose does not just use "cut and paste". It should have its own email program, so the email is filed in the contact's History record. A good contact manager will add a new contact record to your database and automatically insert the email address with one click.

You can also send one email message, or target hundreds of email messages to specific groups of contacts. Query for just your prime clients and send the same personalized email message to each of them. A good contact manager will allow you to personalize each email message when you email merge. For example, it will read "Dear Susan" instead of no salutation. Make sure the contact manager you buy has the ability to send

personalized email. Most contact managers just use cut and paste in the BCC (blind carbon copy) field of a separate email program.

If you already have a contact manager or have a file with names and addresses, it is easy to import that data into a new contact manager. Usually you will be presented with a split screen showing a list of the data in the two databases. Just match up the fields and all of the data will be imported in minutes.

Costs

Contact managers usually cost between \$100 and \$2000 dollars. The best place to find the one that works for you is on the Internet. It is easy to download these programs and try them before you buy them. Another type of contact manager is a PIM, personal information manager. They are less expensive, but lack many of the features mentioned in this article. You should get a program which will grow with your needs. Life is certainly getting more complicated, but a good contact management program will simplify your life and make you feel like you're organized and really in control.

Conclusion

It is clear to see that managing a list of business contacts has become more complicated, a problem brought about by developments in technology. However mastery of such lists is possible by the use of good contact management software, especially ones which automate time-consuming, yet mundane, tasks. It can also be a great tool in giving the customer the perception that they are being offered a personal service by people who care about them and their needs.