

Guest Opinion

Proven Ways to Keep Track of all Your Key Contacts

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I've seen them everywhere in drawers, coat pockets, stuffed in envelopes or scattered on the desk. When access is necessary frantic scrambling occurs to go through each and every 'one' to somehow find that one person, that one number, or email address. It is the number one most kept marketing material of any person. You guessed it, the infamous 'Business Card'!

Relationships are a powerful tool in today's business world. Using your contacts as resources and potential sales maximizes your business potential. A person today might have four or more phone numbers; two to three email addresses; as well as separate mailing addresses for home, work, and one or more satellite offices.

It can be difficult to track all this data on a business card or within a paper address book. With today's realm of contact and personal information software (i.e. Outlook, ACT!, Lotus Notes, etc.) it is very easy to maximize your contact management abilities. Although entering your data into the software can take some time it becomes an instant resource for locating information and tracking your contacts quickly and easily.

Once you enter your contacts electronically here are some easy tips to maximize your contact management software;

Tip 1: Always enter the correct information in the designated field. You might be tempted to enter an email address in the mailing address field simply because you only use the email address and want it to be immediately visible when you open the contact. But don't give in to that temptation! Keeping information stored in the appropriate fields maintains the integrity of your data when you sync with handhelds or need to import or export it into other software.

Tip 2: Categorize your contacts. Most contact management software have the capability to group or categorize contacts. This can be useful for multiple reasons, including sending group emails, creating mailing labels, printing phone lists, and tracking resources. Commonly used categories for grouping contacts include personal, vendors, clients or customers, prospects, association or organization names, types of industry, mailing lists, and project names.

Each software uses a different method for assigning a category or group to a contact. Most software includes in the contact window a field or tab used to assign categories or groups. If you click in this field or tab, you can assign specific groups and categories for each contact.

Tip 3: Use your views. Most software provides various options for viewing contacts, by name, company or by each category and group you have assigned. These views give you the user another way to see your data. The beauty is that you enter the data in once, and you can see it in different views depending on your need.

Tip 4: Use the note and text field. When you create a new contact you will have a space that is a note or text field that gives you the capability to track notes that relate to a particular contact. This function can be extremely useful for collecting and tracking information about a person and an organization. You can add data in the notes area as a means of remembering your last contact with someone or to record key information that you need to remember for your next contact. Some note fields have an auto date function. If the software you use does not, manually enter the date before making a note. Because the notes are linked to specific

contacts, the data they carry is always easy to find. Most note fields also sync with handheld devices so that you can see the data when you are on the road.

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