

Reach Out and Touch Your Fans—Faster and Easier than Ever!

Using a Contact Management System

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We know you've been collecting contact names in anticipation of using a contact management system that we told you about previously (See *InSinc*, June, 2006.). You've selected a system (we recommend Act! for most of you) and you're ready to go to work entering your valuable contacts.

Before you enter even one contact into your system, you need to decide how you want to categorize your contacts. Some people are lumpers, putting everyone into just a few buckets; others are dividers, splitting their contacts into dozens of highly-specific categories. Too few groups, and you can't target your marketing; too many, and it quickly becomes a maintenance nightmare, consuming far more time than necessary. A reasonable compromise? Aim for about five to eight categories to start with, and tie the categories to the kind of marketing activities you plan to do. For instance, reader/fan, bookseller, and writer are useful categories for most of us, because we'll send different announcements to each of these groups. You'll probably want a category for friends and family, and since you can put people into several groups, add anyone who's read your books to the fan group as well.

Now that you're organized, it's time to enter your contacts. Begin with your friends and family members, then add colleagues from your day jobs, neighbors, and those you know through religious, community, or professional organizations. You may be surprised to discover how many people you know and who know you. Be selective;

only choose people who will be pleased to hear from you. Your old high school boyfriend's wife might not be happy to find their names on your mailing list! Add everyone who's contributed to your writing work: publishers, booksellers, readers who attend your signings, author colleagues, and writers' organizations, among others.

For some contacts, you may only have an e-mail address; for others you may have several phone numbers, work and home address, and more. Add a note about where or how you met the person, such as "friend of Mary's" or "Border's signing May 06," to refresh your memory in the future. You'll find there's a place to enter nearly anything, from birthdays to pet names, but it's generally best to stick with the information most relevant to your marketing efforts. When you're tracking thousands of contacts, less is more: address, email, and phone are most important.

What happens when you want to market but you're missing data? Systems like Act! are pretty smart. When you're ready to contact all your readers, for instance, you select the "reader" group to send an electronic message or print address labels. If you are printing labels and you have only an e-mail address entered for that contact, the system automatically ignores missing data, in this case, a postal address. Similarly, missing e-mail addresses are disregarded when sending electronic mail.

By the way, don't break the CAN-SPAM law! We assume you have permission to email your contacts, but just to be safe, include an opt-out option so that recipients can politely decline if they change their mind. Be sure to update your contact system with those requests so that they don't inadvertently get future emails.

So you're using your system and sending out announcements. How do you keep your contacts up-to-date? Periodically (weekly or monthly) go through both received and

sent e-mail messages. Select significant messages that might be relevant for future contact, such as an offer to review an upcoming book or an offer to host a book event. Cut and paste that information on the appropriate contact's page in the "notes" section, and mark it for follow-up, if appropriate. Next, add in any new contacts, address changes, and other updates. And if you've done a group email, double-check any "bounced" emails to see if they are still valid.

This updating should take only fifteen to thirty minutes because most messages are not important enough to capture into the system. You can do the same with necessary information from phone calls or voicemail messages. If you think this periodic process might be too time-consuming, remind yourself of how much time you spend hunting through piles of notes to find exactly the information you need.

As with all systems, there are some disadvantages. Integration with your website or mail system, such as Outlook, may not link smoothly, despite vendor promises. Electronic contact data are changed frequently, often resulting in a bundle of returned messages after you've sent a message to a group. One helpful option is to use an online tool, such as Plaxo.com or CardScan's Accucard service, which will email your contacts regularly to request updated information. These services only work, however, with a valid e-mail address.

Another issue--some spam filters are so finely tuned that they stop messages even from known contacts. Universities and government addresses are especially selective, and you may find those nearly impossible to reach via your simultaneously-sent messages. Avoid large graphics or file attachments, for starters, along with intensive use of popular terms like "free," "amazing," "great offer," and "order now." You can even

run your email through a spam-checker, like Lyris's popular and free service at <http://www.lyris.com/resources/contentchecker>. It looks for spam trigger words to help you keep your emails Inbox-friendly.

Once a year, perhaps right before you send holiday cards, go through the system to clean up your data. Eliminate duplicates, add notes you may have missed during the year, remove contacts you no longer need, and check that contact information is as up-to-date as you know. If you have a large database of contacts, this may be time-consuming. Spreading the task a few hours at a time over a week or two makes it easier to keep focused. When your eyes begin to blur, it's time to stop for a while.

As with any other project, once you've been working with the system for a while you will find it becoming more and more routine. Be adventurous and try new features on a regular basis—as you move from beginner to power user, you'll find more and more ways to reach out to your network. Then sit back and enjoy the benefits of reaching more people and selling more books!

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