

How to Manage Your Marketing – The Contact

Management System

Toolbox Teleclass Transcription

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Professional Program

Track 3: Nuts & Bolts: The Fundamentals of Business



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INTRODUCTION

Welcome to the Advanced Toolbox Tele-class, marketing... The contact.. I'm sorry, the Customer Relations Management class or the Contact Management System. So, in this class, I'm going to talk... Well, actually let me back up.

IN MARKETING 101 AND CREATE SYSTEMS CLASSES I TALK ABOUT DESIGNING YOUR MARKETING SYSTEM – THE FIRST PIECE OF THAT IS THE CONTACT MANAGEMENT SYSTEM

In [Marketing 101](#) and in the [Create Systems classes](#) and some of the [Multiple Streams in Music Income](#) classes, Music and Art Income classes, we talk a bit about setting up your systems and creating systems that are going to be usable and sustainable over the long haul is critical to your success in your business.

One of the first systems that you want to set up after you've set your time management, and your financial management systems is to really start building your marketing systems, and the contact management system or customer relations management system is the first piece of that.

IN THIS CLASS I'M GOING TO COVER WHAT YOU NEED IN A CRM AND HOW TO USE IT TO SYSTEMATIZE YOUR MARKETING

Now in this class I'm going to talk about what you need in this system and how to use it to systematize your Marketing. However, technology is changing so much, so fast, there's always new stuff coming out. It would be impossible for me to say, "Okay, you need to buy this software and set it up in this way," because not only is new stuff coming out all the time, how you run your business, whether or not you want to be highly digitize and portable or you're much more brick and mortar or you really like the tactile sensation of physical systems.

You know, all of that stuff is really personal, and I think the problem a lot of people run into when setting up system is they try to fit their square peg into somebody else's idea of the right round hole.

And so I don't want to do that with you guys. I want you to get the concepts and enable you to figure out what the best system is for you.

And as I talk about in the [Create Systems call](#), you know you need to understand how you operate and build a system that's going to work for you, because bottom line is if you don't do it that way, you will unlikely to maintain it over the long haul. You will probably set it up, looks really great on paper, but in day-to-day functioning, it doesn't really work for you.



So the problem with that isn't you, the problem with that is the system. It's not the right system for you, okay? In general, what I've found is when someone comes upon a system or creates a system that really gets how they work, it becomes very easy and obvious to maintain.

DIFFERENTIATE BETWEEN CRM AND EMAIL LIST OR FAN MAILING LIST

So first I want to talk about in differentiate between what I'm talking about tonight, which is the Contact Management System or the Customer Relations Management System and I'm using those two words.

There's two names by the way because in marketing and corporate you're going to hear see CRM (Customer Relations Management) system. That's kind of the catchphrase for what we're talking about, but you may also hear Contact Management System, and I think that if you're not from a corporate or marketing background, Contact Management System makes more sense.

But really ultimately, what this is going to enable you to do is manage your customers and manage them so that they buy from you and they continue to buy from you over and over again, because it's really about relationships, right? That's what I teach.

I want to differentiate between the CRM and your fan or customer email list. The CRM is much more the business-to-business aspect of what you're doing and less about the individual sales or the business-to-customer sales.

And that is I think a difference in the arts industry as opposed to other industries is that very often we have to think of both. Business-to-business are things like booking gigs or shows, are things like getting signed in contracts or licensing that kind of thing, as supposed to a fan who comes to see the show or downloads your music or buys a painting, you know, or even buys a book.

You know, so the difference for writers would be business to business is agents, publishing houses or even places where you could have readings versus people who are buying the individual books.

The other thing that would be included in this kind of business to business category is the joint venture partners. So if you're co-promoting to someone else's list and promoting them to your list, that's more of a business-to-business relationship.

So what we're talking about today is how you manage your contacts that are in the business-to-business realm, in the booking gigs and contracts realm versus the individual sales. When someone signs up for your mailing list, you're going to be managing that



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through some kind of a mailing list system, and I talked about that in the call with Elizabeth Edwards on your email list and some other places in it. I probably will create a call strictly on that topic. It's a whole separate topic.

But this is really about let's say you go to a booking conference and you meet-- You have cards from 30 new venues. How do you manage that contact information, as well as manage the sales process as you begin advance and develop a relationship with those people, which hopefully will lead you to booking gigs and so on.

In evaluating the different systems that are available to you, so that you can choose which system you want to use and design how you use it--your marketing system, there's some things that you have to...that those systems have to be able to do.

Before I get into that, I want to talk just a little bit about how this integrates in with your marketing system. And I forgot to put that in my outline so I'm just making a note to myself.

When you think about booking gigs or gallery shows or, you know, getting yourself placed at conferences, you know, how ever you are promoting yourself kind of in advancing your business.

There's a process that generally you're going to go through. So, there's the initial contact and that initial contact may be a networking contact, you know, at an event. It may be a referral contact meaning so-and-so referred me to this person.

It may be a cold contact, meaning you just said, "Okay, I'm going to be in Chicago and I want to book some gigs in Chicago. What are the venues there?"

And you Googled it and you got a list of venues, and then you did some research on those venues and you picked out 5 that you want to approach, right? So it could be that cold, okay? So it can run from a very warm contact--someone you met in person--to a very cold contact.

And the process is going to take several steps and will look somewhat different depending on what happens within each step. So let's say you're booking performances, okay. You're a musician, and you're booking gigs.

And you were following up on a contact that you met at a conference, and so you have that information in front of you. You call that person. You have that nice conversation, and they say, "You know that is very interesting. This is great! But we're not going to be booking. We're booked for this season already, and we will be starting to book for next season until May, which is 4 months from now. Well, go ahead though we're interested, go ahead and call us back in 4 months."



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Well, how are you going to remember to call them back? Or perhaps you reach that person and they say, "Great, send us the marketing package." So, you send them the marketing package, but then you need to follow up with them.

So, this process may take...so you may send them the marketing package. You follow up with them. It may take 3 calls to reach them again, because people are busy and then you reach them and they say, you know, "This was great. I had a chance to listen to your CD. I really love it, but we're not booking until June." Right? So there's going to be a lot of different steps throughout the process.

It may occasionally happen where you call them and they book you right away, but that I would guess would probably be the exception to the rule that really your sales process is going to be a multiple step process.

And you need a system to manage that process from start to finish, however long it takes. In addition, once you've booked that gig, there's a whole bunch of things that you need to do in order to complete the process with that customer, in order to deliver your services or fulfillment.

And that might include sending them a contract and getting the contract sign. It might include doing all of the arrangements for travel, for hiring musicians to back you up. It might include, and it should include a whole list of activities for promoting that gig.

And this CRM or customer relations management system is one piece in that much bigger system. So I wanted you to kind of have an idea of what I'm talking about when I'm talking about the bigger system.

And that bigger system you're going to design, because it really depends on your business, as well as how you want to conduct your business. And there are going to be some pieces that are standard, but there are going to be some pieces that are really unique to you and how you operate.

And so you're going to be building that out may be through a checklist or one of these systems, but the actual customer relations management piece, meaning managing their contacts, scheduling tasks, taking notes on each individual contacts you know, all of that kind of stuff ideally you buy a system already built out.

This is a case in which your time is better spent on the actual marketing than on the programming of the system. And so what I want to talk about is how do you choose a system and what you should be looking out for, so that you can evaluate these systems and pick the one that's going to be right for you.



WHAT MUST YOU BE ABLE TO DO WITH A CRM

TRACK YOUR INTERACTIONS WITH PROSPECTS FROM INITIAL MEETING OR CONTACT THROUGH THE LIFE OF THE RELATIONSHIP

So, what must you be able to do with your contact management system or your customer relations management system? First of all, you need to be able to track your interactions with prospects from the initial meeting or contact through the life of the relationship and that includes their contact details.

ALL CONTACT INCLUDING PHONE CALLS, EMAILS, MAILINGS SHOULD BE DOCUMENTED

It includes all of the contact history, so the phone calls, emails, mailings, and you know, what happened with each contact.

CREATE REMINDERS FOR FUTURE EVENTS

You want to be able to create tasks and reminders for future events, so that when you get off the phone with someone who says, "Call us back in 4 months," you can schedule and you will call them back in 4 months.

Now you shouldn't try to remember this stuff in your head, because you won't, I promise. 7 months from now you will think, "Oh damn, I was supposed to call that person. Oh no, it's too late." Right?

Don't try to remember these things. Have the history documented in your system and set up. They call them ticklers or reminders for the future event. The call you're planning on making in 3 months, the marketing package that you need to send out, the follow up call on the marketing, you send the following marketing package up. Today you need to set up reminder to follow up in 2 weeks, whatever it is, okay?

SALES PROCESS ACTIVITIES

Ideally you should be able to track the sales process activities. Some systems are better at that than others, and like I said, you may end up developing that outside of the system and then the system becomes a piece of that bigger system.

EASILY ACCESS THE INFORMATION AND MAINTAIN IT.

You need to be able to easily access the information and maintain it, which means it should be easily searchable. You should be able to easily file and update these systems, so that the next time you pull up that person's information, you can read through the entire history, and remind yourself that the last time you talked they were on their way out the door to a ballet recital for their daughter, who is 9 years old.



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So the next time you call you can say, "Oh, how did that ballet recital go?" and they will think that you are awesome, because you remember. But really you just take good notes. This is the solution for your overwhelmed brain. Don't try and remember it, take good notes, and then read the notes before you make that phone call. So easily accessible information and simply maintained.

IMPORT DATA FROM EXCEL OR CSV FILE (COMMA SEPARATED VALUES).

If it is a digital system, you know, a computer system or cloud-based system, you should be able to import data from Excel or CSV files. That's comma separated values. That will enable you to take whatever system you're using now and upload it into the new system.

It will also enable you to be able to be faster in how you get new people into the system, and I'll talk about that in a bit. So now that you know what a system should be able to do for you and kind of how you want to be thinking about using it within your larger marketing system.

HOW TO EVALUATE THE BEST SYSTEMS

How can you evaluate the systems to decide what's best for you.

FIRST THINK ABOUT WHAT YOU NEED

So first of all you need to evaluate yourself and what you like, what you prefer, how you operate best? So here are a couple of questions for you to be thinking about in this process.

ARE YOU ALL MAC ALL THE TIME? ALL PC? A MIX?

So the first one is: are you all Mac all the time? So if you are someone who's got a Mac, an Apple computer, you know, a Mac computer and an iPad and an iPhone and that's all you ever use, then you're going to need an Apple compatible system.

Are you all PC all the time? Are you working on a, you know, a Dell computer, an Android phone or a Blackberry, and you generally are just you know PC or you are a bit of a mix? Does your system need to be able to work across the platforms?

ARE YOU ON THE ROAD AND NEED SOMETHING FULLY PORTABLE?

Are you on the road a lot, but you're still managing yourself, so you need something fully portable?

DO YOU HAVE A TEAM AT HOME WHILE YOU ARE ON THE ROAD – SO YOU NEED SOMETHING IN THE CLOUD?



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Or do you have a team at home while you're on the road so you might need something that could have multi-users and perhaps even work in the cloud?

DO YOU NEED TACTILE VS. DIGITAL?

And finally you want to ask yourself: do you prefer the digital to the tactile? Meaning something you can hold in your hand and touch or do you prefer the tactile to the digital?

The answers to these questions are going to really help you hone in on which systems might be the best for you. A lot of digital systems give you a 30-day trial so you can kind of dive in and muck about inside and see you know how you like it and how it feels.

SOME WELL KNOWN SYSTEMS

What I want to do next is briefly go over some of the most well-known systems and give you kind of my opinion on the pros and cons of these systems. There is no one right system. You're going to be looking for the system that's right for you, and you may change your mind over time. You may change your mind a couple of times, I certainly have.

Throughout my business I've work, I started out with a physical system, and then I went to a big honking digital system, and then I simplified. I went to a smaller system and now I've got several systems kind of cobbled together, which I'm still working within.

You know, it's really a question of finding out what you think is going to work best for you. Setting up a beta test, you know, trying it out and seeing how it works.

OUTLOOK

So the first one I want to talk about is Outlook. Now Outlook is the PC-based Microsoft office system. I'm not talking about the later version which is simply email; I'm talking the full professional office version of Outlook.

Pros – standardized and has most of what you need built in, email integration

Now the Pro for Outlook is that it's standardized, and very often if you work with other people, they are familiar with Outlook. Most of what you need is built-in. It integrates with email, your contacts and email are integrated, but you can also set up tasks, you can set up journal entries by contact, so you can tract the different interactions.

So if someone calls you, you can open up their contact and write a journal entry, and you can set up tasks that will integrate with the Outlook calendar and will remind you of when they're due.

Con – not portable or sharable and gets overwhelmed with a lot of volume



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The cons. I was with Outlook. I used Outlook probably for about 4-5 years and I ended up leaving it primarily because I have so many emails on a daily basis, and I save a lot of them because I'm tracking my client interactions.

That Outlook got really slow. I mean it will literally take me 5 minutes to search for a contact. 5 minutes or to search for a contact's emails, it would take just forever for the information to flood in and that got really hard to handle for me.

The other con is it's not really portable or shareable. Meaning that unless you're on Microsoft Enterprise, which is expensive, you're not going to be able to have someone else get into your Outlook and help you with things.

So if you have a marketing assistant, they're not going to be able to help you within your system--update calendar or tasks or follow up or do those kinds of activities. There is the Microsoft Enterprise, but it's pricey. It's like 50 bucks a month or something. It's expensive.

So currently that's not...If you're on the road a lot, it's not necessarily the best methodology, but if it just you and you are on the road and you're able to take your laptop with you and have internet access, you know, that could totally work for you. I have a couple of clients who use Outlook and are pretty happy with it.

ACT! AND SALESFORCE

The next systems I want to talk about are ACT! That's A-C-T-! And Salesforce. Now both of these systems, along with GoldMine—GoldMine, I think is kind of gone out of style. They didn't really keep up with the changes in the world and is somewhat left. I'm not even sure if they're still in business.

But ACT! And Salesforce, there are couple of others as well, but these are kind of the 500 pound gorillas in the corporate marketing world. Here are the pros...

Pros – really comprehensive – can do pretty much everything you could ever want a CRM to do, some email integration

They are comprehensive systems you can not only track your contacts and your, you know, your journal entries and your tasks, but you can track really that entire marketing system, because you can create a sales process within these programs and run the process with different clients.

So they are really comprehensive. They can do mail merges both internet and snail mail. They're pretty comprehensive. Here are the cons:

Cons – very expensive and a steep learning curve



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They're expensive. My experience with ACT! I was on ACT! From 2003 to 2005 when it actually burned out my computer is that it is an absolute memory hog. I literally could have nothing else open when I had my ACT! Program opened, and it just was it's really not built for individual computers. It's really built for a main frame or a network, and I just...That may have changed, but I haven't heard anything to tell me that it's changed. So you know depending on your system, I just found it really clunky in that way--slow.

And for both of them also, there's a fairly steep learning curve. Now I believe that Salesforce has recently come out with cloud version, but it's expensive. It's a--I don't know something like \$30 to \$50 a month.

So it really is-- they're really much more corporate based and meant for corporate, and so for most of you guys, they're probably going to be way more program than you really need.

INDIEBANDMANAGER

The next program is Indie Band Manager. Obviously, I'm going to have links to all of these resources in the call. So Indie Band Manager was actually designed by my friend, Charlie Cheney.

Charlie Cheney is an indie musician. He's a folk-pop kind of performer. He's a little bit goofy and funny, but he's also a computer programmer and so he created a File Maker Pro system to manage his own touring process. His own customers as he was developing his touring and for his music business.

And he realized, "Boy, other people probably want this tool!" And so he set it up to be a product, and it's relatively inexpensive. There are two levels: the light version and the pro version. You have a 30-day trial period. I will tell you that I use a combination of Gmail and/or Google Apps, which I'm not going to talk about in this call because it's not really a customer relations management system yet, though they keep threatening, but they're going to get it there I just haven't seen it happen yet.

So I used Google Apps for my email and calendaring, and I use Indie Band Manager for my contact management system or customer relationship management system.

Pros – built on filemaker pro, mac and pc compatible, relatively inexpensive

The pros are that it's built on Filemaker Pro. It's both Mac and PC compatible. It's relatively inexpensive. It does all the things that I talk about where you can import a whole bunch of contacts. You can schedule tasks or calls or mailings. Once you've booked a gig, you can also use the system to create contracts and track your --the pro version, you can track your inventory with. It's got a lot going for it in this way.



Latest versions allow for multi-user and iphone/ipad accessibility, designed for performers

The latest version, which I believe was just released last month, is now allowing for multi-user and iPhone/iPad accessibility, and it's really designed by a performer for performers.

Cons – not integrated with email

The con as far as I know is that it is not integrated with email. So if I want to email someone I have to go into my email system to send it, and then if they email me back it's not linked to their contact in the way that Outlook does link to the contact, which is really nice.

And it's a little bit...visually, it's a little bit primitive, you know. It's not way pretty, but it really does pretty much everything you need it to do. Now the latest version he may have updated to look, I don't know. But that's kind of, for me, those are the pros and the cons of Indie Band Manager, and frankly even though it's called Indie Band Manager, I use it for my speaking and coaching business.

I know other people who have used it for their visual arts business. I mean it's basically a contact management system, so you can really use it for anything. You can edit the contracts. You know you can go and then do all that stuff, okay?

DAYLITE

The next system is not one that I've had personal experience with, but I had a client buy it and use it while we were working together, and he absolutely adores it. And that's Daylite. Now Daylite is a strictly Mac product and here are the pros:

Pros – Works across all mac products, really customizable for your sales process, integrates CRM with marketing methodology and tasks, integrates with email and calendar, multi-user, syncs with blackberry

It works across all Mac products so it works with your Apple computer, your iPad, your iPhone. It integrates seamlessly. It has a multi-user interface. You can have it integrate with your mail, with your email system on Mac, and with your calendar. I just was on their website and it now syncs with Blackberry which it didn't used to do.

It is a hefty program, and you can literally design your entire marketing and sales process on it, which is great because the way he used it is he designed his sales process, and then he gave it away because it was built into the system.

So he, you know, he hired a marketing person, and she was able to step right in to his shoes, because she had a checklist of tasks for each new contact and she just had to



work through it. And so that made it easier. That system actually made it easier for him to delegate.

Cons – mac only, (though you can import from PC), steep learning curve, pricey

The cons on it is that it really is a Mac only, though you can...if you are currently on PC and you transition to Mac, you can, I believe, import from your PC database.

It does have a fairly steep learning curve. In fact I believe he went to--he took a course to learn it, and it's pricey. It's not inexpensive. It's a couple of hundred bucks.

And the more you integrate it, you know, each level of integration costs a little bit more...the multi-user a bit more expensive than the single-user and like that.

So I would say it's usability is on the level of ACT! and Salesforce, but I think it's more built for an individual or a small business owner and so it has a lot more flexibility in that way.

CARDSCAN – PRIMARILY SCANS FROM BUSINESS CARDS INTO AN ADDRESS PROGRAM. BUT YOU CAN EASILY EXPORT FROM THERE.

The fifth is not a customer relations management system per se. It's more a way a quick and easy way for you to get all those bloody business cards into your system, and that's something called Cardscan.

Now I also know that there is an app for the iPhone where you can take a picture of a business card and parse the information but I don't know if you can parse it into your iPhone database, but then I don't know about exporting it into a more sophisticated customer relations management tools.

I don't own an iPhone, so it's hard for me to kind of investigate these questions. Though if you know the answer to that question, please add it as a comment.

But what Cardscan does is you feed the scan through this little scanner. It's about, I don't know, 4x6 inches and fits, and you know, plug into a USB into your computer. It comes with a Cardscan program, where you can--you'll read through and make sure that the interpretation of the business card is accurate and that the right data is going into the right fields.

I found it to be about 75% accurate, 75-80% accurate, and it really, really depends on the business card. If it is black lettering on a white or ivory background, it's going to be much more accurate. The fancier the business card, the more trouble it has interpreting.



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If it's you know if you got a really busy background and then you're using white letters, it tends to get really messed up, but it does decrease the amount of time and the amount of typing you have to do.

And then you can export it and it has the export properties for about 30 different programs. So it's really easy. You get the information in there and then you export it. The way I use it is I get everybody's business cards from whenever I am at, I input all the business cards to Cardscan, I separate out the people that I want to personally contact and the business cards that really I'm just uploading to my email system, and then I create, you know, I just export through Excel into my other systems, either into Constant Contact for my email system or into Indie Band Manager for my contact management system.

3X5 CARD SYSTEM/NOTEBOOK SYSTEM

Now if you really, really like tactile-- I actually put up on my resources a 3x5 card system that I was taught mid 80s, you know, before the PC. I remember when I got my first computer in 1988 that I started transitioning to using the computer to do this, and it was really... Man, it was interesting.

But I have a 3x5 card system, so if you are really tactile person this might work better for you. I've also had people use the same concept of the 3x5 card system, but use a notebook instead, you know, just because they found that the 3x5 cards were too small for them to get all the information on it.

The pros with the 3x5 card system is that it's a way cheap, probably cost you about 15 bucks to set up. You need a couple of those recipe card file holders, you need some dividers, and you need a bunch of 3x5 cards.

You can take your business cards and just staple them on there, and then jot down notes. What I did is I had two separate file boxes and for each person I created two cards. One card was just their contact information, which I filed in the first card file which was A to Z, so that if someone called me or I needed to call someone I could just easily put my hands on their contact information.

And then I had an ongoing card box that had 1 through 31 and January through December as the dividers, and as I you know, so let's say it is Monday... It's Wednesday, February 29th, and I've got 5 people to call, and on the first person I'm calling when I'm done with the call, I need to follow up with them in 4 months so that would be March-April-May-June, so I would put them behind the June divider.



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And when I got to June then I could decide, "Okay, what day in June?" and would put them within the 1 to 31 dates. And so I used those dividers kind of as a tickle system and basically just kept moving the cards forward.

So the pro is that it's very tactile, and if you like physically handling this stuff, then it's there for you and you know it is as old as the hills. Sales people have been using this kind of contact management system for eons.

There are lots of cons to it in my opinion. One, it's not particularly portable, it's bulky. Two, it takes a lot of physical work to maintain. You have to remember to pull people forward. If you're only making, you know, doing contacts once or twice a week, then people can fall through the cracks. It's just...it takes a lot to maintain.

Again, it's writing on those little tiny cards. It's being able to read your own handwriting. It does not work really for delegating, unless someone is working physically in your office, and if you lose something, there's no back up. There's no back up for this system at all.

Where a lot of digital systems have ways to be backed up, okay? But if you really tactile, then this might work better for you. I also have one client who had some physical disability and having the physical cards was actually easier to deal with than reading the computer.

The other thing, if the 3x5 cards or the 4x6 cards even are too small, I had a client who use notebooks and basically just have the dividers in the notebook and used and gave each person a page, you know, a three-ring binder with a three-hole punch page and would just forward the pages and use the dividers in that way.

But again, it's physically clumsy, there's no back up. And they're big, you know, it's a lot of weight, if you're on the road it's a lot of weight to carry.

So, now that I've gone over some systems and kind of have some of the pros and cons, I did that not only to talk about the systems that are most frequently talked about, but also so you could get a sense of how I evaluate each system.

And what I think a pro is and what I think a con is, you know, based on my experience within these systems, so that you can also be having that conversation for yourself because for example I'm the PC person so Daylite's never going to work for me.

But if you're an all-Mac person all the time, Daylite might be the answer to your dreams. It certainly was for my client.



DESIGN YOUR SYSTEM

Okay, so now you've got to design your system.

BEFORE YOU INVEST THE TIME AND ENERGY IN SETTING UP YOUR SYSTEM REALLY THINK ABOUT HOW IT WILL OPERATE FOR YOU

And before you invest the time and energy in setting up your system, you really need to think about how is it going to operate for you both physically, timewise, how is it going to fit inside of your schedule, how do you want to work, what kind of a sales process that you're thinking of walking people through. Really think about what you want and need from a system, and then start setting the system up.

You know if you dive right in and buy a system, then you may have bought--spent a lot of money and time and energy only to find out that "Oh, it doesn't do this and it doesn't do that, and I really, really need it to be able to do that.". So really design it.

SKETCH OUT ON A FLOW CHART HOW DATA WILL MOVE, WHAT YOUR SALES PROCESS MIGHT LOOK LIKE AND WHAT THE PIECES ARE THAT YOU WILL NEED TO BUILD

So what I would recommend is to sketch out on a flow chart your marketing sales process. How is the data going to move? What is your sales process going to look like? And the nice thing about a flow chart is that you can make decision points if they say YES here it goes there. If they say NO here it goes there, if they say MAYBE it goes here.

You know, and you could kind of work that out. What are all the difference pieces or stages or steps that you will need to build in your marketing system and where does this customer relations management system fit inside that bigger continuum.

Do you want a customer relations system that is able to handle the entire thing? Or do you really just want to be able to keep track of your contacts?

Because you know, if that's all you want, then something like IndieBandManger or Outlook is probably going to be plenty of system for you. Daylite or ACT! Is probably going to be way more than you need, okay?

Some of my clients have used Excel Spreadsheets, and I will tell you I don't like them. And I don't like them, because visually, you are seeing everybody's data all at once, and that can be really overwhelming very quickly. You know with most of these contact management systems you are looking at one person at a time.

It's also difficult to track your tasks using an Excel document. You can use like a checkout point. You can add comments, but you can't just add a glance and visually see, "Okay, I've made one call, two calls, three for this person." This is the stage they're



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at. This is where I have to go next, "Oh, he said that they book at this time this year..." You know, all of that data that you get in that conversation, you want to be able to see quickly and easily. And so that you can be prepared the next time you get on the phone with them.

So if you kind of sketched out the system, then you also wanted them go back and look at the options and kind of think about what might be the best system for you.

CREATING THIS SYSTEM IS GOING TO TAKE SOME SERIOUS TIME AND ENERGY – DON'T TRY TO IMPLEMENT IT IN THE MIDST OF UNUSUALLY BUSY TIME

Now creating this system and this is true with all systems. Creating the system is going to take some serious time and energy to create and implement. Don't try to implement it, don't try to create it and implement it for the first time in the middle of a very busy time, because it just...it's too hard.

SCHEDULE IT

What you want to do is look at your schedule and schedule when you are going to build your system and schedule chunks preferably large chunks of time;

BANG IT OUT

And then bang it out and get the system set up. But then you need to actually implement the system into your life. Building a system is useless unless you use it, right? It's just a waste of time and energy and resources unless you actually use it.

IMPLEMENTING THE SYSTEM

ONCE YOU'VE BUILT THE SYSTEM, YOU THEN NEED TO START WORKING IN IT ON A REGULAR BASIS

Once you build the system, you need to start working in it on a regular basis.

WHEN SCHEDULING MARKETING TIME, INCLUDE SOME ADDITIONAL TIME TO MAINTAIN THE SYSTEM

When scheduling marketing time include some additional time both at the beginning of the marketing time and at the end of the marketing time to maintain your system, to update your notes, to schedule the tasks for the next thing that you have to do with that person.

You may do that as you go with each contact or you may do it all at once at the end, that to some degree is going to be depend on your system. If you're using the 3x5 cards



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system, you may want to do it all at once at the end and just kind of go through, read the notes, schedule it, put it in the right place in your card file.

But you need to build that time into your marketing schedule, because it takes time to maintain these systems. They don't maintain themselves.

DOCUMENT YOUR CALLS, CONTACTS AND PROMISES

You need to document your calls, your contacts, the promises you make. The actions you take, the follow up that's needed. You need to really document everything. The more you try to remember it in your brain, the less room you have to be creative, because your brain is all busy trying to remember all this stuff.

SCHEDULE THE NEXT STEP IN THE RELATIONSHIP BEFORE YOU CLOSE THE FILE

Schedule the next step in the relationship before you close the file, so that people don't fall through the cracks. Even if the next step in the relationship is to add them to your email list and next.

This is not a good prospect., You just file it, because you never know that may change, or maybe you know a year from now you going to follow up with that person, because you're going to be further along in your business, they might be in a different place in their business, and that you know, in a year from now you could just follow up with them and say, "I want to update my contact database," you know. "Is this the person who's doing the booking? Or you guys still booking, you know, what kind of... Where are you in your booking cycle?"

Like that, because what that also band does is that continues the relationship. At some point that relationship may be appropriate for you. You may be a good fit for them, but you want to schedule whatever the next piece is for that person immediately because again otherwise they fall through the cracks.

TAKE REALLY GOOD NOTES BECAUSE YOU WON'T REMEMBER THE CONVERSATION – JOT DOWN ANY PERSONAL INFORMATION (TRIPS MENTIONED, UPCOMING EVENTS IN THEIR LIVES, EVERYTHING)

Also, make sure that you jot down any personal information, trips mentioned, upcoming events in their lives, vacations, illness, anything. Anything they give you that you can then refer to in the next conversation to create and build rapport, because they will feel like you really paid attention and listened and heard them, and it will set you apart from just about everybody who calls them.

SCHEDULE REGULAR CONSISTENT MARKETING TIME AND ALWAYS START BY LOOKING AT WHAT'S DUE IN THE SYSTEM



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You want to schedule regular consistent marketing time and always start by looking at what to do in the system. Start by looking at your task lists, your reminders. Who do you need to call? What's up? What's next?

And if you find yourself really falling behind on that task list, you need to schedule more time. You just need to schedule more time.

AFTER LARGE EVENTS (BOOKING CONFERENCES, ETC.) SCHEDULE TIME TO IMPORT THE NEW DATA AND NOTES FROM YOUR CONTACTS.

Now after a large event where you have met, you know, 300 new people. Before you leave for that event, schedule in the week or two weeks following the event, time to import new data, to record the notes that you took on those contacts.

And by the way, during the conference, during the event, make sure you write down notes on the cards or attach to the cards or on your iPhone or whatever in your Evernotes, so that you are not depending again on your memory for these things. Because I promise you, you're going to get home and you're going to look at that stack of card and you're not going to remember who any of these people are, what the promises you've made and you're going to get overwhelmed, and they're just going to go into a big pile and you're not going to follow up on them.

USE CARDSCAN TO SHORTCUT THE DATA ENTRY PROCESS

IMMEDIATELY SCHEDULE WHEN YOU WILL CONTACT EACH NEW PERSON – SO FOLLOWUP BECOMES PART OF YOUR ROUTINE

So schedule the--Take good notes during the conference and schedule time immediately after the conference to upload, to get these new contacts into your system, and immediately schedule your next contact with that person.

So immediately decide, "Okay, I'm going to call that person on the next Monday." So that follow up becomes part of your routine, okay?

Well I hope that was helpful in designing your contact management system and that piece of the larger sales system. And feel free to submit questions on this. Anything that you didn't understand or places where you're stuck around applying it to your individual business. Feel free to submit those questions right away to the next Ask Coach Debra call.

Remember, you don't have to wait for the next call to be coming up. You can submit your questions as soon as they occur to you. I'll answer them in the next call, and then you can download your answers at your convenience. Have a great night, great day,



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great night, whenever you're listening to this call, and I look forward to meeting up with you on the next call.