

Successful Internet Strategies

Excerpt From: Superb Tips and Tricks *for* Managing Your Customer Information



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Getting you much, much, much more from the Internet

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Introduction

To be effective in marketing today, be it online or in print communications to your customers and prospects, you need to be targeted.

Pertinent and valuable

People are overloaded with information. If what they receive is not pertinent, or adds value to them, then they won't read it full stop. Very quickly you'll also lose your permission to correspond or to use email with them.

To add value, to target, you cannot treat everyone the same. You wouldn't want to try to sell meat to a vegetarian would you? To treat people and businesses differently, you need information about them.

Valuable customer knowledge lost

But what if that information is in your head? Or in the head of your employees? Or on a piece of paper? You can't move with speed. You can't contact many clients at a time. You can lose valuable customer knowledge if an employee leaves.

So you've got to take all the information from your head, from your employee's heads, from paper files, from your Outlook Contacts or Outlook Express Address book, from your proprietary database and merge it in **one** place in the computer. Build a marketing database or enhance the one you have.

Why have a centralised source of information? The reason is fourfold.

Personalised communications with a push of a button

First is when you have all that customer and prospective customer information in one spot in your computer, you can literally (with the push of a button) create terrific marketing, business development, customer service and communication letters and emails – all personalised with any piece of information in your database. This will significantly help you to build a much, much more profitable business. How? By simultaneously helping lower your marketing and operating costs and bringing in new business and income. With ease.

Increase your business value

Secondly a good marketing database can help increase the value of your business when you go to sell it. It makes a much more valuable going concern.

Someone else do the work

Third, when the information is in the database, any assistant can create marketing campaigns, customer prompts, monthly newsletters and send them without you doing the manual work. It can't get better than that.

Everyday software is marvellous

Fourth, you would not believe how easy it is to do all this just using the everyday software you have. There are so many features you probably don't know about that will save you literally hours and hours and hours of time. I'll tell you all of them.

That is why I think this book is worth its weight in gold to you: whether you're starting from scratch, enhancing your existing or company one, or if you just want to know about great tips, tricks and shortcuts.

I will take you step by step (in plain language and with great screen shots) through everything, then we'll end with great ideas for using the marketing database.

You might consider purchasing the two companion books to Superb Tips and Tricks for Managing Your Customer Information: **Successful Email Marketing**, which gives you a great foundation to build your marketing strategy (I concentrate on email as the vehicle) , and **Professional Online Newsletters – Exactly How To Create Your Own** – if you'd like to do an online newsletter.

CHAPTER ONE

Before You Start

Please. Don't start a thing yet. I want you first to stop and think. Stop and think about what marketing you'd like to do now and over the next few years. Think about what business development you'd like to do. Anything new you'd like to try in the customer services arena? Is there any new business activities that you might consider? New product, new service, new branch/store?

What about additional staff? Will you ever need to know or monitor their productivity or their contribution to business? If so how will you measure it? What fields would you need? If you start a newsletter – will all customers and prospects get it? Will they want it in print or online? If online in plain text or in colour? Will the same newsletter go to everyone (or like me, will you customise an online newsletter and send out four to five different versions each time?

Phone numbers. Are you entering country and area codes now? If not, should you put them in the new database? Yes, if you ever plan to market in any way based on geographical location.

See why you need to stop and think? Not just rush head long?

1. Plan.
2. Design.
3. Move.

Joint Venture Marketing

Another significant aspect to measure up (and I'll bet my bottom dollar you haven't thought of this) is the value of having a complete database to use for joint venture marketing campaigns. One of the most delicious aspects of truly making your database your goldmine is to think outside the square, looking for new ways to get to your target market.

By joint venture marketing I mean what companies, associations, clubs (and the like) can you think of that have clients or members that fit your target market and are non-competitive with you? If you're going to be successful in attracting good joint ventures, think about what data they might need –and start capturing it.

Let me give you an example. Let's say a web design company wants to do a joint venture with us (Successful Internet Strategies). They might want us to target our

clients and prospects that have websites. We might want to target their clients and prospects that are interested in email marketing. The problem with our database is that we do not consistently ask or fill in the field of web address in our database. So we wouldn't be able to do this joint venture to their satisfaction.

Be Smart

By the way joint venture marketing does not mean giving your database to others. Let me make this perfectly clear. It means you forwarding an offer for someone else to your database. It could be in the form of an article by them in your newsletter, or an emailed introduction by you with a special offer to your clients – even a direct mailing with a letter of intro coming from you. Never, ever give your database away to others to use. You keep the control. Secondly don't go overboard marketing others left, right and centre to your database. Don't over work it. You don't want to lose that fragile thing called permission.

Planning Your New Database Requirements

Please turn now to **Action Plan Step One** at the end of Section One.

Write down all the marketing, business development, communication and customer service activities / campaigns / programmes that you'd like to do over the next few years (don't forget to include ideas for joint venture marketing).

Stop after completing Action Plan Step One, and then come back to Chapter Two.

CHAPTER Two

Clever Fields And Suggestions

Plan Cleverly and Concisely

When planning your marketing database, the last thing you want to do is to manage and hassle with a database that goes on forever - an endless array of different fields.

A field is a singular piece of information that is held in your database (example - first name, last name, phone number). Each field has its own home a “Column”. Columns are vertical.

Each different entry has its own Row. So if your database consisted only of first and last names of 100 clients, you’d have two Columns (first name and last name) and 100 Rows (the 100 different clients). Rows are horizontal.

If you don’t plan well from the beginning, you could end up with just too many Columns to manage. I mean you don’t want to have so many Columns that your data entry ends at the Column BZ (Excel labels Columns alphabetically so BZ would be the 52nd Column across).

The solution is instead of having a different Field for every variable, think in Categories.

Wrong Way

You set up a Column for clients, a Column for prospects, a Column for old clients, a Column for suppliers..... Then you would enter either the person’s name in that Column or a yes/no or true/false.

The Right Way

Instead you set up one Column called client type and have different Categories (or variables) for the filler – being client, old client, prospect, supplier.

In other words where ever you can create a group, or eliminate the yes/no; true/false with a category – do it.

Where this does not work is when your grouping would comprise too large a list of variables. For example let’s take a well published management consultant. He has 30 different products for sale and some of his clients have bought more than one product. He’d have to devise an incredibly large group with all the permutations available.

What would I suggest in this circumstance? I'd see if he could break the group of 30 products down into a few categories. Perhaps one for audio, one for books, one for workshops, one for consulting.

This is doubly clever because then he can create targeted sales and promotional campaigns. He simply sorts the database by name and product categories. For example filtering for the people who have bought a book in the past so he can market a new one to them. Or people who have bought an audio but haven't been to a seminar.

Suggestions for Fields (outside the obvious name, position and location ones).

1. Personalisable

Be sure to have first and last name always separate so you can personalise communications. I mean how personal does Dear Kirsty Bell sound instead of Dear Kirsty?

2. Communication

With the variables being for example:

- a. Print
- b. Both
- c. Html (colourful emails)
- d. Plain text
- e. **None** - Don't make the mistake I've been making for years!!!! Every time someone asked us to take them off our email list, we would go to our database and delete them – the whole contact information, kit and caboodle. But – they only asked us not to send them the newsletter – not to **not know** them anymore!!!! So by putting none, when it's time to do your email distribution you can sort by this communication field, filter out the none's, and email to the rest.

3. Interested in

What services of yours they're interested in.

4. Source

Where the client or prospect has come from. This is an extremely good way of tracking your marketing, joint ventures, referrals and newsletter subscriptions. It can show you over time what is – or more importantly **isn't** working. And again, it allows you to sort and do special marketing campaigns to them.

5. Form

If you have several places on your website where people can fill in a form to subscribe to your newsletter? It's interesting to note which form they filled in and submitted. Again – it helps you track where the subscribers are coming from – how deep into your site are they going? . Is it a pop up? Is it from your

contact page? Is it from somewhere else?

6. **Date**

When was this contact added to your database?

7. **Classification**

Do you want to grade client importance to you, like the old A, B, C's?

8. **Regional Codes**

This is a clever idea if you want to market to an area that is smaller than a State (Australia), Island (New Zealand) but bigger than a city? If you were putting on a small client seminar in Brisbane, you wouldn't invite people from Cairns for a 2 hour bash would you? Hey, don't even think about it – you'll burn your email list if you do! So you might want to have a NQLD and a SQLD.

9. **Age Bracket**

Much smarter to put in a date of birth and calculate age that way rather than entering actual age details. This way the age brackets will never get out of date as time goes by.

10. **Customer Details**

Items that can be used for marketing campaigns – like date of last visit, when something is running out or expiring. Renewals, items sold.

11. **Industry**

Helps you to be a better marketer. You can target industry specific information by email, by post or within a newsletter.

12. **Forgotten Anything?**

Look at everything printed you have now that collects information. Are there any fields there that you should put in your marketing database that you haven't thought of?

- a. Other files in Excel and Word
- b. Contacts / cards
- c. Purchase orders
- d. Quotes / estimates
- e. Invoices / receipts
- f. New client forms
- g. Credit applications
- h. Service records
- i. Packing slips

Planning Your New Database Requirements

Please turn now to **Action Plan Step Two** at the end of Section One.

Write down for each of the marketing, business development , communication and customer service activities / campaigns / programmes that you'd like to do over the next few years – what information you will need to do it well.

Action Plan Step Two A

Combine them all in the Information list – but be sure not to add duplicate fields.

Stop after completing Action Plan Step Two and Two A, and then come back to Chapter Three.

CHAPTER THREE

How Will You Fill In Your Holes?

1. Stop again.
2. Plan.
3. Do not rush in.
4. I repeat. Do Not Rush in.

First, let me tell you four data collection stories.

Four Data Collection Stories

1. Financial Planning Firm – to get you motivated

I spoke at an annual meeting of a group of financial planners and with my normal spiel, begged them to get email addresses of their clients and contact their clients and prospects more regularly.

Six months later, coming home at midnight on the last bus from the New Zealand Financial Planners Annual Convention – one of the members of the financial planning group sat next to me and asked if he could tell me something. “Of course” I said.

He said “Well, Debbie, you said to get email addresses. I looked through my database and saw that I only had 10% or so of my clients’ email addresses in it. So I asked my Personal Assistant if she wouldn’t mind working a few late afternoons and evenings calling clients to ask for their email addresses.

Well, you wouldn’t believe it Debbie (he continued), just about every time she called someone, they wanted to speak with me. Would you believe that I have done hundreds of thousands of dollars in new business – and I haven’t even sent out one email yet”!

This highlights a point I make all the time. It’s not the method of contacting clients – be it mail, email, phone; it’s the actual contact itself. By establishing some sort of a regular communication strategy, you will not only win by increasing your income from existing client, you’ll additionally increase the level of referrals you get from them too.

2. Manufacturing Company - who’s your market and how much effort must they exert

In the boardroom of a prospective new client, I was sitting chatting with the Managing and Sales Directors. The Managing Director explained that they were sending out a print newsletter to their customers (the people who purchased their products for in-house use or for resale). They were terribly excited about the prospect of communicating with them by email and perhaps even their end of the line customers (the people who bought their products at stores) by email.

They only market though an in-house sales force who are face to face with their customers. The trouble was they didn't have very many email addresses in their database.

They thought they could get quite a few customer email addresses if they put a contest in their print newsletter with a big incentive. Their customers (who had to read the newsletter to find out about the contest) were required to fill out the coupon and mail or email in their email details. Even though the newsletter went out to several thousand, and they had a great prize/incentive, guess how many responses they had? Under 15! They couldn't understand why.

I have seen this time and time and time again. I suggested that it takes a lot of motivation for someone to cut a coupon out, fill in the details, get an envelope and mail it. And when it comes down to who the person is – if it's executives, they're even less likely to take the time and trouble.

*My suggestion was to turn the table around completely. Create a contest and incentive for their sales team to see who can get the most email addresses within a certain time frame. After all that **is** their job. Their role is to see and be in contact with the clients anyway, isn't it?*

3. Tourist Attraction – vast numbers through the doors

Sitting over coffee with the Managing Director of a South Island tourist attraction. We were brainstorming how they could collect the contact and email addresses of everyone that visited them.

The Managing Director became very excited about getting customer email addresses. His thought was that as people came through the “door” (and paid to get in), this would be the time the individual would be asked to fill out the form with their email address and contact details on it.

I said “Wait. Stop and think what will happen if you do this. Think of the hold-up and the lengthening of the waiting time and queue to get in. You don't want to disrupt a quick and smooth flow do you”?

Instead I suggested why not give everyone a pencil and the form. Let them bring it back to you at their leisure during the day in exchange (for the completed form and the pencil). You can give them a little chocolate or some similar small reward – and don't forget to mention the reward when they're handed the form and pencil.

4. Large Corporation – Building up database information

Another conversation over coffee. This time the goal was to get more detailed information from existing (and new) online newsletter subscribers. All this company currently had was email addresses.

Their Marketing Manager thought a nice large prize would be a great inducement to get their existing and new subscribers to give a bit more information about themselves – simple stuff like name and city.

Since they already send out a useful newsletter (in my opinion) I thought that a large prize wouldn't be quite necessary or the right fit. I suggested instead a large amount of smaller prizes would be more appropriate. Why?

- a. Reduce the amount of fraudulent entries. I mean if there was a big prize hanging – wouldn't you enter your mom, dad, sister and brother?*
- b. In line with above, keep the mailing list more targeted to their market.*
- c. As many were already on the mailing list, and getting "rewarded" with a good newsletter, special events without cost, giveaways and the like – they didn't need another strong inducement in my opinion.*
- d. Again it was only basic contact information they were after (so they could target more).*

What about you?

Okay. You've got a few ideas from the four cases above about harvesting email / database information.

Think about how you're going to get the holes filled in yours. Will you call? Will you mail? Will you outsource it?

Have you thought about killing two birds with one stone and asking other questions at the same time? I mean you're making the effort already, so don't waste it!

Summing up: Eight great tips on obtaining the missing database details.

1. Staff Responsibility

Put the onus on staff to get the information – not on clients to give it to you.

It's much better to have your sales reps, your franchises, P.A.'s collect it rather than ask clients to send it in themselves.

2. Importance to the business

Explain to everyone involved what it means for the company, why it is so important to you and then ultimately them. Then give them the responsibility of doing it. Let me tell you a true story told to me by the owner of an automobile dealership.

The owner had the foresight to want to contact clients by email. So he had installed in the credit application a field for email address. In fact it was so important to him, that unless the email field was filled in, the data entry for the rest of the credit application couldn't continue.

When they went to do their first email to clients, they had over a 50% bounce rate. He couldn't believe it. He went back to the people entering the credit applications and found that because they were often given the paperwork without the email field filled in, they didn't take the time to call the client or salesperson back to get the correct information. As they didn't want to hold up their work or the application, they just made up fake email addresses.

How would you like this to have happened to you in your business?

3. Fun & Competitive

Make it an internal contest if appropriate. Make it fun and run it as an incentive if possible. Chart it (Excel is perfect for this you know). Pit sales person against sales person in a fun way. Set goals and set timelines. Remember it can be a massive job so break it into pieces, modules of activity. People respond to different rewards – so structure different incentives that fit the individuals that work for you.

Put yourself in their shoes (actually you might already be there if you don't have any staff to help you). Which sounds better to you – having to contact 1000 people; or contacting 5 people a day over 9 months?

4. Outsource

If you are doing it solo, why not hire someone to help? Mothers and college students are great! If it's a simple act of just data entry, they can do it at their home and just email you the spreadsheet.

5. Bite Size Pieces

Otherwise as mentioned before – break it into smaller manageable pieces.

6. Client data entry online

Try to get your clients and prospects to enter their details online. And you should absolutely have this information going into a database so you don't

need to touch it at all – just download the online database and merge it into your main one. Ask your webdesigner how this can be done. Remember if you are asking your client to go online to fill out their details be sure to give them an incentive, a reward for taking the time if possible.

7. Incentives – many little instead of one whopper

Many little rewards instead of a whopper is a much better idea. People feel like they have the chance to win this way.

8. Joint ventures for prizes

If the signup is for a newsletter going to a large distribution base, see if you can get local business support – let them give you some free giveaways in exchange for you getting them – their name, their sponsorship in front of their target market. An idea could be a coffee shop chain (free cup of coffee), a local bakery, a complimentary business to yours.

Planning Your New Database Requirements

Please turn now to **Action Plan Step Three** at the end of Section One.

This is your data collection plan, where you will list what steps you'll take and the actions required.

After completing Action Plan Step Three come back to Chapter Four.

Debbie Mayo-Smith Profile

Managing Director Successful Internet Strategies

“A native New Yorker, Debbie is a world leading authority on database, email and Internet marketing and a top rating presenter”. From New York City to Borneo, Sydney to Perth, Debbie wow’s her audiences with her easy to follow, non-hyped approach, visual presentations and clever ideas and strategies on incorporating database marketing with email and the Internet for business development, sales and customer service. Debbie is in demand as a keynote speaker, trainer and consultant with a client list that reads like a who's who of International business.

Need a Speaker? Leading International CRM, Marketing and Internet Expert"

Want an inspiring, motivating yet practical ‘How-To’ message on improving sales, marketing, office efficiency, business development and customer service?

Do your attendees want to know how to improve their website results (need I ask)? Then you must have Debbie help with your next conference or with training.

Individually crafted presentations

No two presentations are ever the same. I’ll spend time reviewing websites of attendees and customise it to them. I’ll also speak in depth to your IT people to learn in detail about what software the majority of the attendees use for their client information and also what marketing, business development and services they’re likely to do. Then I’ll weave this knowledge into my presentation to enhance what they’re doing now and add in new ideas, tips and tricks that they can take on board.

The content is motivational and practical at the same time. I use everyday language (nothing technical) with visual examples and "what's in it for me" from the attendees point of view.

Free Pre- Conference Online Survey

I will conduct an online survey of all those invited or all the attendees before the seminar to structure my presentation completely at their level.

I can add any questions you like and I’ll prepare an Executive summary of all responses and I’ll also give you all their answers on an Excel Spreadsheet.



Free Continuing Education

Each participant will receive a free subscription (if they like) to my monthly online marketing and business development tip newsletter so the learning continues indefinitely!

Profile

ASM designation National Speakers Association. Honours Bachelor of Science Degree in Economics and Geography - Southern Connecticut University USA.

Michael F Barnett: Chief Executive: Auckland Chamber of Commerce:

"Our star presenter was Debbie Mayo-Smith, our highest rating speaker"

Leisa Donlan: President Australia Society of Association Executives CEO Australasian Rotational Moulding Association

Just thought I would send through a very quick email. Following your advice we've updated and changed our web site www.rotationalmoulding.com and we are now listed NUMBER ONE on google for "rotational moulding" and NUMBER TWO for rotational moulders.

We are absolutely wrapped about the results. The site can probably still use some work, but what an improvement, your seminar changed our whole philosophy.

Jeff Tubbenhauer CFP

Just a short note to say thanks for presenting at the AMP conference where you gave us a talk on emailing. I bought your book, read all of it and have put your email know how together for my own use. My first email August 02 produced me around \$1,800 of fees. Thanks!

Ralph Penning

Executive Trustee Independent Business Foundation (Debbie's Newsletter)

"You are a real winner. Your Successful Internet Strategies newsletter receives the highest rating among the promotional mailings reaching my screen. Why? Because you don't mind giving away handy tips that others guard like trade secrets. I constantly mention you as a role model, and won't mind your quoting me on it."

Description of Books

Want To Build A More Profitable Business? Than You Must Have This 3 Book Trilogy:

<p>Successful Email Marketing Your Complete 'How-To' Guide</p> <p>Become a superb marketer of your business; then apply the strategies to email. S.E.M. continues with detailed instructions on how to write, design and send emails that get results for you. You'll learn tested tricks, tips, pitfalls, solutions, case studies and examples from New Zealand, Australia and around the world. Furthermore everything you'll learn can be related to websites and print communication too!</p> <p>Heather Douglas: Managing Director Homebizbuzz: "What a great publication, worth many times its weight in gold! Few books show you how to make as much difference to your bottom line, with so little expenditure, as this one. It's a simple, foolproof guide to getting a cost-effective email marketing strategy off the ground, and leveraging every bit of worth from it for years to come! There's so much value in here - I don't know how any home business these days can operate without implementing every one of your ideas".</p>	<p>Version</p> <p>Print</p>	<p>Price</p> <p>\$35.00</p>
<p>Superb Tips And Tricks for Managing Your Customer Information</p> <p>A veritable treasure trove of tips and tricks. This gem of a book will set you on a minimum effort course to building your own goldmine – for now and the future. Whether starting from scratch, enhancing your existing database or you just want to know inside expert tips, this book will prove invaluable in saving you time, anguish and helping you enact marketing campaigns at the push of a button.</p> <p>In plain language and with great screen shots, Debbie will show you how to take your customer information and work with it in Excel. You'll slash hours and hours off your workload learning how you can automatically clean up data, fill in the holes, add in your email contacts, fix keypunch errors and finally create targeted mailing lists in 2 minutes flat.</p>	<p>E-Book (you download)</p>	<p>\$40.00</p>
<p>Exactly How To Create Your Own Professional Online Newsletters</p> <p>Do you want to take your online communications from average to spectacular? Do you want to send a great professional looking online newsletter to your clients and prospects? You don't need to go to expensive advertising or web development agencies or the budget of the large corporations.</p> <p>All you need is good to intermediate computer skills and this great new fully illustrated Step - by - Step 'How-To' Manual.</p>	<p>E-Book (you download)</p>	<p>\$25.00</p>

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