

## Computer Corner

(Computer Corner is a regular column on information technology by Denis Williamson of MacLamor Computer Consulting.)

### 3... 2... 1... Contact!

Of course, this would never happen in *your* office: Pat, star sales rep at Rockland Rox, has been trying to get in the door at Bigfoot Toys for months. It finally happened last week. Pat met with Sam, director of procurement, showed the products, and was asked for a proposal. The proposal was faxed to Sam yesterday.

At 3pm today the receptionist tells Mick, the sales manager, "Somebody named Pam from Bigfit Boys is on the phone - something about a proposal supposed to be faxed yesterday. They never got it, and Pat's not in the office." Mick leaves messages for Pat, who's playing golf with a major client, and spends the rest of the afternoon trying to locate the Bigfit Boys proposal. When Pat calls in at 5:30, the conversation is short and unpleasant. "Mick, I gave the Bigfoot proposal to Jan to fax yesterday. Can't anybody in that office do anything right?" When asked, Jan says, "You asked about *Bigfit*, not *Bigfoot*. I have the Bigfoot proposal right here. I couldn't fax it because Pat didn't give me the fax number."

Bigfoot buys from a competitor. The following week, Pat resigns.

Ensuring timely access to customer information and coordinating customer and prospect-related activities are challenges to any organization. Smooth hand-offs between sales, customer relations, accounting and service are essential but difficult to achieve. To address this problem a number of software products were developed starting in the mid 80s. They range from simple mail list managers to personal information managers like Lotus Organizer to sales force automation products like Sales Logix to sophisticated groupware products like Lotus Notes. Mid-range contact manager products like Act!, Maximizer and GoldMine meet the needs of most small and mid-sized organizations.

A well-designed contact manager allows you to capture basic information about a customer or prospect: name, title, department, phone and fax numbers, e-mail address, industry, level of interest, etc. Phone calls can be logged, letters and literature mailed or faxed, appointments and future calls scheduled, and notes about conversations and meetings kept. Unsuccessful attempts to reach the prospect can (and should) be logged, drastically shortening "You didn't call me back" - "Oh, yes I did" conversations. Complaints and questions can be assigned and followed up.

Contacts meeting specific criteria can be selected for mail, fax or phone campaigns. One client, a commercial real estate broker in Manhattan, uses GoldMine to select tenants occupying, say, 8,000 to 10,000 square feet on Park, Madison or Fifth Avenues between 44th and 57th Streets for a mailing. Responses are logged and tracked. If a prospect says, "Our lease is up in September of next year. We'll be looking for 10,000 sq. ft. in the East 40s. Call me in January.", that information can be noted and a call scheduled for then.

A good contact manager allows mobile users (like Pat) to dial in and synchronize with the master database. It can also schedule meetings (including the room and projector or easel) and maintain to-do lists. The more complete ones provide partial automation of sales processes like forecasting and opportunity management, and of service and support processes like routine maintenance and complaint tracking. Some industry-specific products include a contact manager as part of a

comprehensive set of tools. Examples include Top Producer, used by real estate agents, and Ezdata Client Data System, used in the financial services industry.

If Rockland Rox were using a contact manager, the outcome would have been different. The receptionist would have looked up “Big” on the computer, seen that the prospect’s name was Sam, not Pam, would have asked Sam to confirm the number, located the Bigfoot proposal in the computer and started the fax on its way while Sam was on the phone.

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