

Improving Your Database

Database management: the act of gathering information about your customers, future, current and past

Like many small business owners, I started trying to update my database several times over the years but never felt I made any headway and repeatedly gave up the task. Kate Groom of Starfish Consulting and former facilitator of my performance group helped me to understand that my customers represent the value of my business, and without them I have nothing but useless knowledge and assets.

With this in mind, I could no longer ignore the growing problem surrounding my database, but where to start?

The answer is obvious now: one customer at a time. This philosophy is referred to as Day-Forward database management. Every time you have a client record open, check that the contact information is up to date and complete. The principle is to manage the data from this day forward and what does not get updated in one year becomes a dormant list that warrants less marketing attention than your current list.

You've heard the Scotiabank slogan, "you're richer than you think!" Well it is true when it comes to data about people and organizations that do business with you today.

Where do I start?!



Improving Your Database

Start with your invoicing system and your accounts receivable. You've got mailing addresses and contact names for your customers and likely some prospects that asked for a quote but never bought. When you combine that with data from the address book in your computer's email application you start to build a more comprehensive list.

Another source of information is the desk full of business cards we've collected at trade shows, networking events, sales calls and gatherings. Don't forget the directory of organizations that you have membership in, Chamber of Commerce, Better Business Bureau, Rotary Club etc. These sources are all populated with names and addresses of people that have corresponded with you or share common interests.

What is a CSV file?

CSV stands for Comma Separated Values, sometimes also called Comma Delimited. A CSV file is a specially formatted plain text file which stores spreadsheet or basic database-style information in a very simple format, with one record on each line, and each field within that record separated by a comma.

CSV files are often used as a simple way to transfer a large volume of spreadsheet or database information between programs, without worrying about special file types.

Creating a CSV file from spreadsheet data is easy in Excel.

So what can you do today?

1. Export the address book from every computer in your office into a .csv file, merge them together and remove the duplicates (check out <http://www.asap-utilities.com> for a must-have MS Excel plugin) and you'll end up with a list to start an email campaign, whether it is a "spray and pray", true multi-channel campaign or retention and referral survey, you will have a way to contact people who know who you are.
2. Most accounting software will allow you to at least export a list for making labels or allow you to print statements. This information along with the contents of various directories can be transformed into a spreadsheet for use in later marketing programs.
3. Take that drawer full of business cards and get them into your email application. Whether

Improving Your Database

you purchase a business card scanner with software to recognize, format and synchronize with your email applications or send them to us, they do no good in the drawer.

4. Make it a policy that you need to get an email address to send a quote and add it to your address book. In MS Outlook you can categorize your contacts so that it is easy to pull a list by category.

HELPFUL HINT:

Do you want to quickly and easily convert your pile of old business cards into a usable electronic database of contacts but don't think you have the time to do it? Let KK Halifax do it for you!

For just \$29 per 100, we'll take all of your business cards and pull out valuable info like name, phone number, email and physical address. Don't let contacts you worked hard to make go to waste! Call 902.453.5151 or e-mail info@kkhalifax.com

Using a Day-Forward database management philosophy means that just a couple of minutes each and every day can really pay dividends over time. These are great projects for times when business isn't booming but be warned, filtering this data is important as well. There may be people that you don't want to contact, no matter how big the list, do a visual check to weed out any bad apples.