

Developing a Contact Program

Purpose:

- To establish a systematic methodology for maintaining contact with a large client base.

Rules:

- Minimum Contact period for all clients and prospects on our database is 90 days ie. a quality contact 4 times per annum. 90 days is not negotiable.
- Need a listing (database) of all Clients (and Prospects, if appropriate).
- Contact Plan must be converted to a system and applied systematically at all levels in the business to be successful
- Developing a Contact Plan:
 - *Step 1: Develop criteria for sorting/categorising clients and prospects.* (Suggest 5 to 10 Criteria with weighted scoring. See attachment for example)
 - *Step 2: Develop Contact Matrix.* Determine the potential Contact Activities and cross-reference to each Category. Reference should be the frequency of contact for this client/prospect and this activity. Eg. All contacts will get a Quarterly Newsletter. A Class clients will get Monthly Visits, etc. (See Attachment for an example)
 - *Step 3: Apply Criteria to the Databases. Sort Clients and Prospects into categories.*
 - Step 4: Establish the systems to ensure that the Program is implemented.

Outputs:

- Client & Prospect Sorting Criteria
- Contact Plan by category and activity
- Segmented database of Clients and/or Prospects
- Contact Systems

Deployment:

Across a multi-user environment and with large databases it is better to utilise electronic databases to manage the Contact program. These can be supported by manual systems, as required.

For smaller users, a manual system can be very effective.

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Attachment:**EXISTING CLIENT SCORING METHODOLOGY – Example**

FACTOR	WT	BASIS FOR SCORING
1. Size	10	7 = Large with National Offices 5 = Medium with no National Offices 3 = Small
2. Volume of Current Work over 2 years	20	1 point per \$20K in fees
3. Accessibility	5	Canberra = 5, Sydney = 4, Bris/Melb = 2, other = 1
4. Potential Fees	30	Great potential = 20, Reasonable = 15, Poor = 10
5. Quality of Relationship with us	10	Good = 7+, Av = 5, Poor = 3 and less
6. Payment Timeframe	10	Good = 7+, Av = 5, Poor = 3 and less
7. Understanding of our Services	15	Good = 12+, Av = 8, Poor = 5 and less
TOTAL	100	



Contact Plan:

90 minimum contact period

Customers	A	B	C	HOT PROSPECTS	PROSPECTS	HOT	PROSPECT	SUPPLIERS	CENTRES OF INFLUENCE
	EXISTING CUSTOMERS			COMMERCIAL		GOVERNMENT			
Activities									
Newsletter	Q	Q	Q	Q	Q	Q	Q	Q	6m
Phone Calls	M	6m	A	A		6m			
Visit	Q	A		6m		6m		S	A
Gifts	√							S	S
Christmas cards	√	√	√	√		√		√	√

Frequency Key: M = Monthly, Q = Quarterly, 6m = six Monthly, A = Annually, S = Selected people only, √ = Yes

