Enterprise - Contact Record Must Haves

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The contact record is more than just a place to save a hiring manager's name and phone number. It is one of the best tools in Enterprise for relationship management and tracking sales activity. This help document will cover the "must haves" in getting the most out of your contact records.

Looking to create a contact? Check out Enterprise - How to Add a Contact.

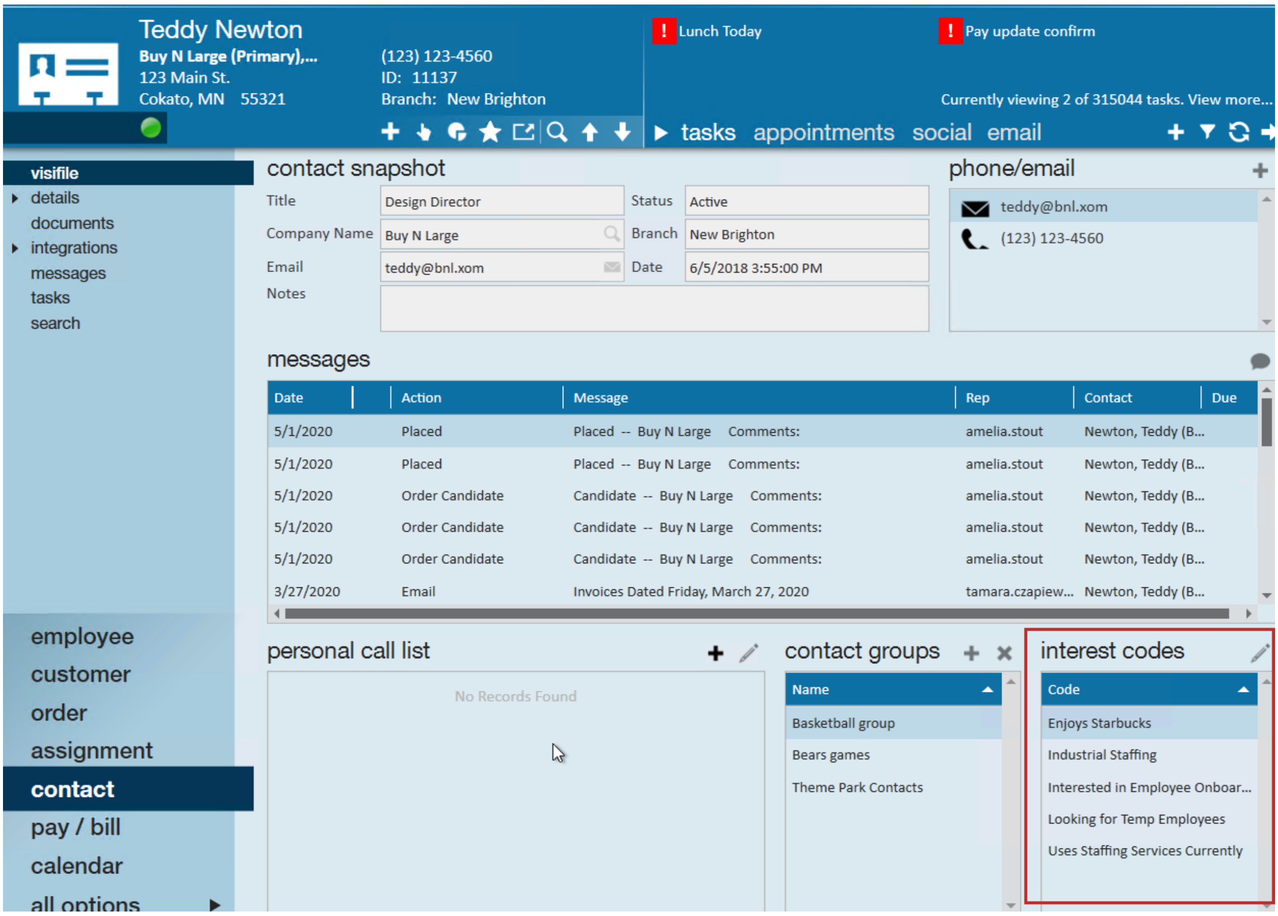
In this article:

Interest Codes

Traditionally, interest codes are used on employee and order records to help match up work experience, etc. but you can utilize interest codes on contact records for many different purposes. Interest codes can be used as a way to group contacts or locate contacts based on specific information. Your only limit is your imagination.

Locating Interest Codes

Interest codes are located on the visifile of a contact record:



Example Interest Codes on Contacts:

1. Type of Staffing
    - What kind of workers are they looking for? (ex. Customer Service, Light Industrial, etc.)
    - Staffing Terms (Temp, Part Time, Full Time, Temp to Hire)
2. Personal Interests
    - Things they love that you can get them gift cards for (coffee, donuts, etc.)
    - Events they attend or are interested in hearing about (marketing, networking, social hour, etc.)
3. Client Tiers or Ranking
    - Relationship or amount of business you do with them (ex. Tier 1-3 or Rank A, B, or C)
4. Sales Information
    - Services you offer that they are most interested in (Payroll, Temp to Hire, New Hire Training, etc.)
    - Competitors that they currently use

Check out Enterprise - Creating Interest Codes & Enterprise - How to Manage Interest Codes on the Customer for more information

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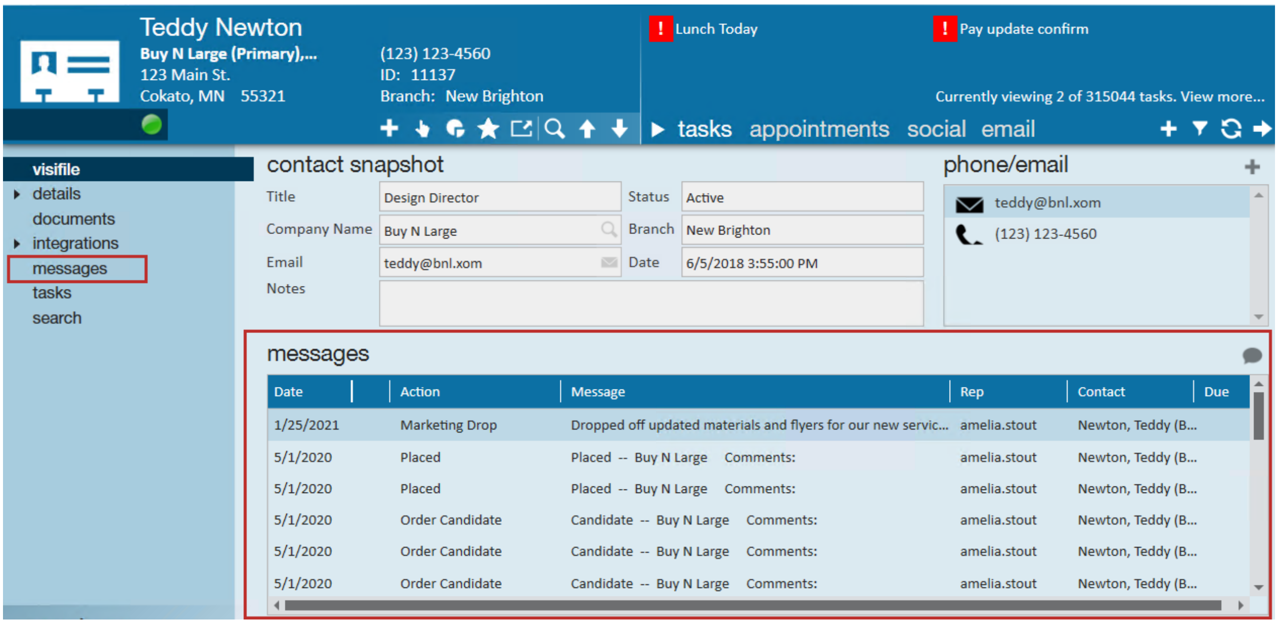
Messages

You can log messages on any record, but logging messages on contact records can be extremely helpful for your entire staff.

Locating Messages

Messages can be logged directly from the visifile or under the messages section on the contact record:



Reasons to Log Messages

Message logging can be extremely powerful if everyone on your team utilizes it. Here are some reasons to consider utilizing messages:

1. Transparency
    - Your whole team will never need to guess if anyone has reached out to this person yet because all the conversations will be logged in one place
2. Tracking Productivity
    - Managers can pull the Message Productivity Report to see how many emails, phone calls, etc. your sales or staffing specialists are logging
3. Keeping Track of Marketing Campaigns
    - If you utilize message action codes for each email or phone campaign you conduct, you can run searches or pull reports to see how many people were contacted, etc.

Utilizing Message Action Codes

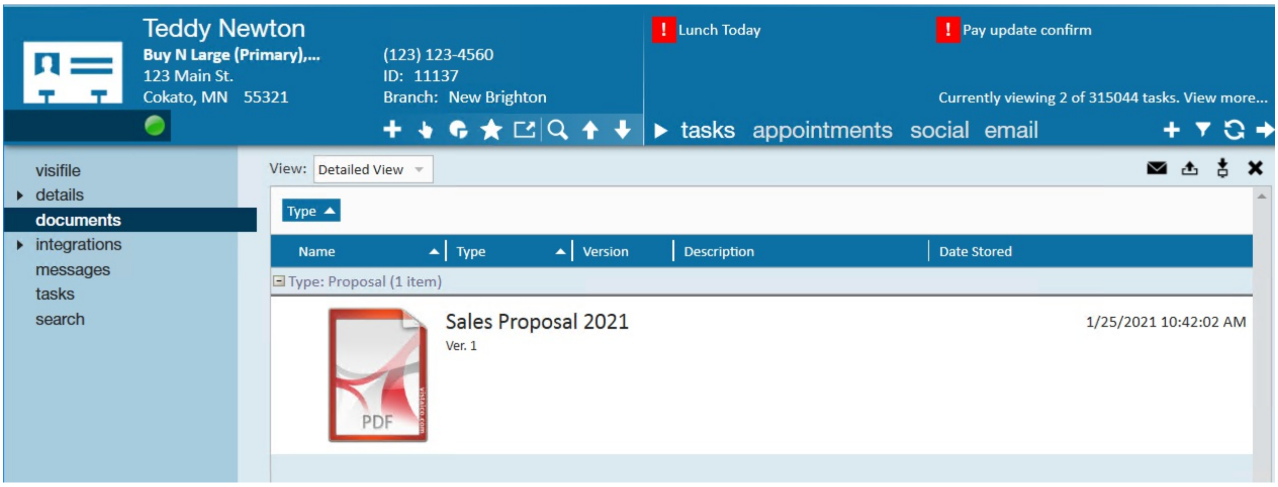
Consider having contact specific message action codes to track different information. You could track each marketing campaign with a different message action code or track successful sales calls showing the sales process and more.

Check out Enterprise - How to Create Message Action Codes for more information on how to customize your system.

Documents

Keep track of what documents you receive or send to a customer contact directly on their record. This can help stop your reps from being unsure or having to look through their computer files or email to find what was sent. This can include quotes, contracts, and more.

Documents can be found under the documents tab on the contact record:

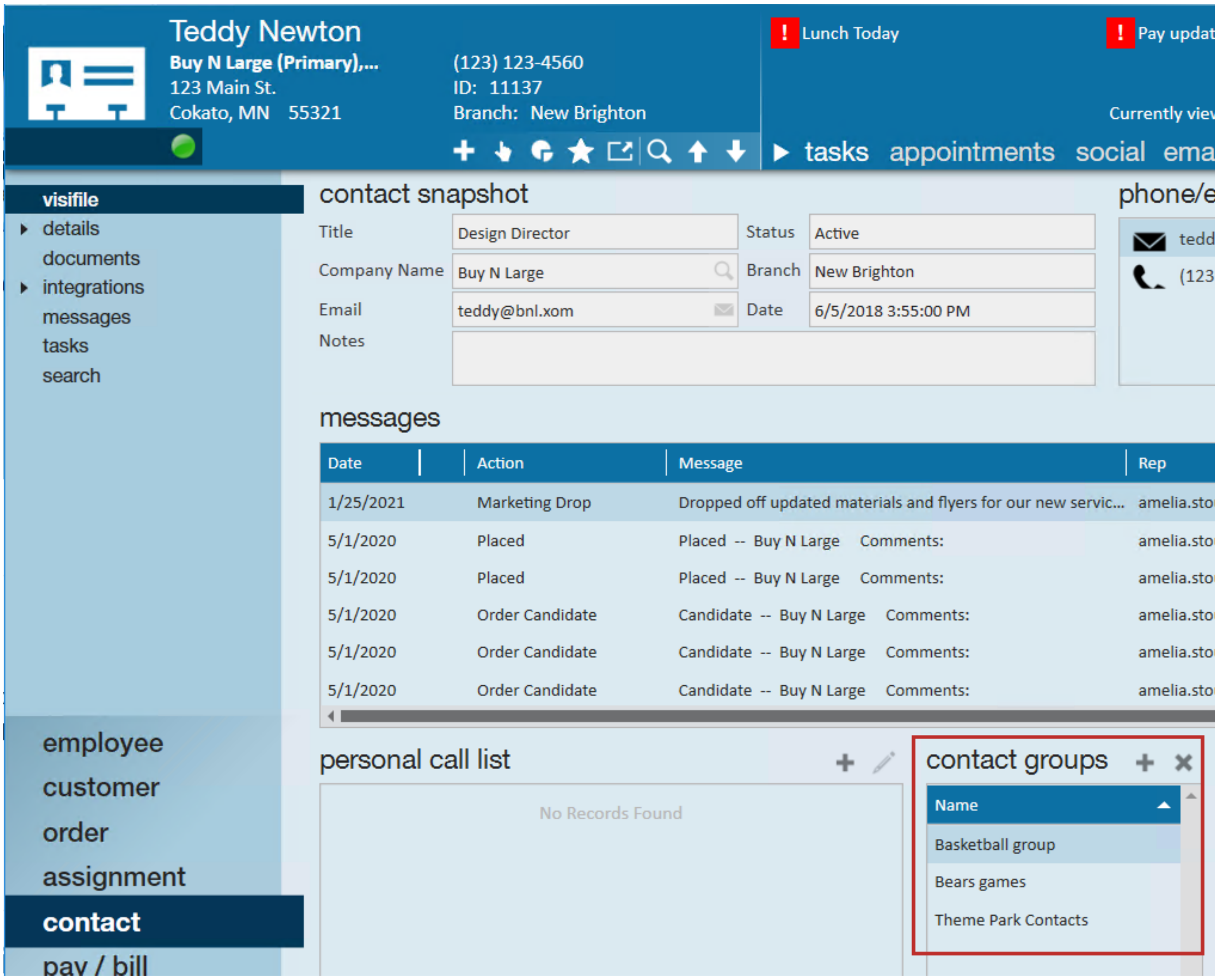


Check out Enterprise - Saving Customer Contracts and Important Customer Documents for document information on the customer record.

Contact Groups

Adding contacts to contact groups will help make sure they are on the right email lists, etc. This can help you quickly email, set up a call list, etc. with contacts looking for related information.

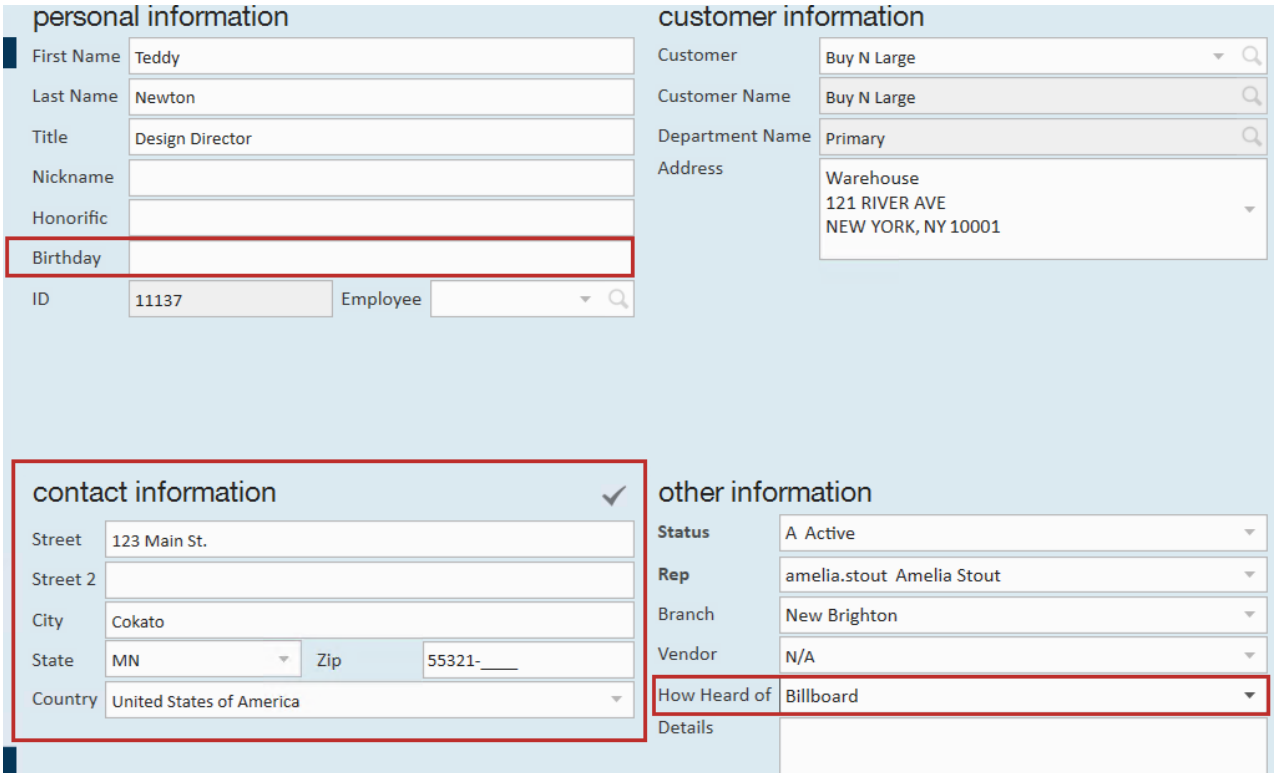
Contact groups are located on the visifile of the contact record:



Check out Enterprise - How to Create Contact Groups for more information.

Additional Details

Here is a list of fields under the Contact > Details section that may be worth filling out for each contact:

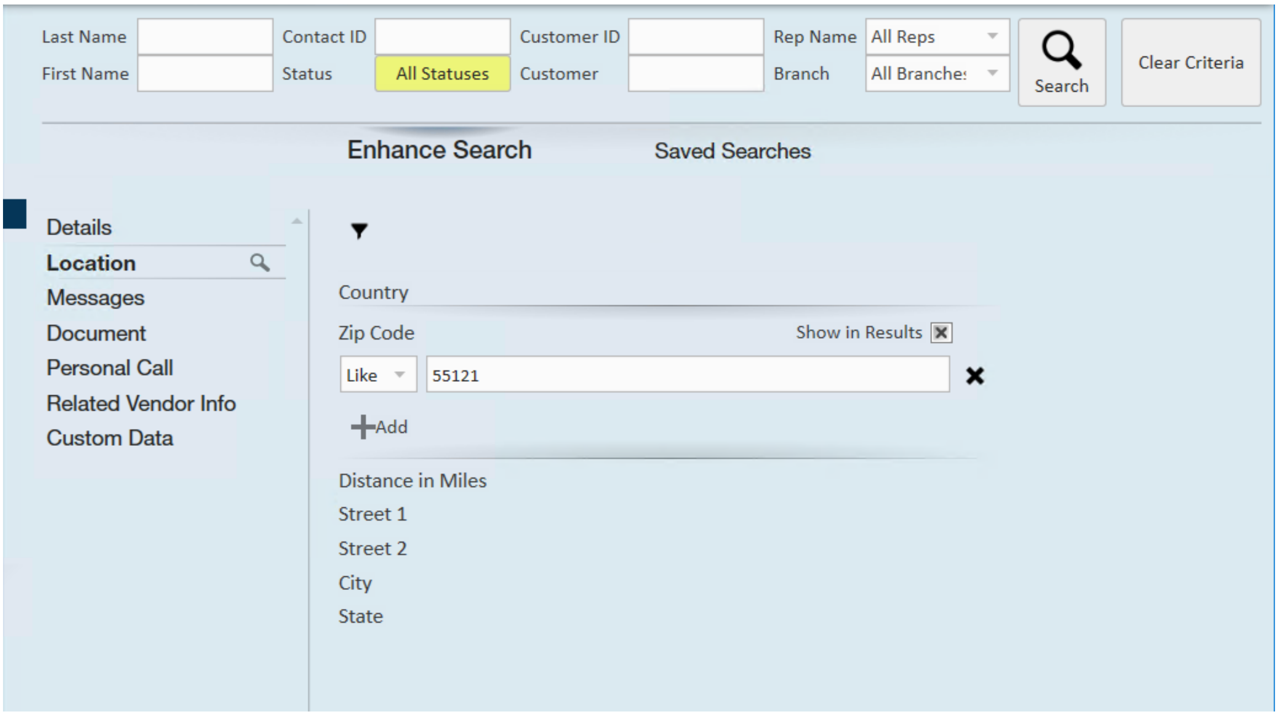


Birthday

If you know the contact's birthday, you can add it to their file and pull theContact Birthday List Report to remember to send them a card.

Address

If you keep the contact address up to date, you can run searches to pull up contacts that you could visit in one area.



How Heard Of

If you track how heard of information, you can search by it to track which marketing campaigns are effective overtime.

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