Contact Management 101: 10 Top Tips for Success

- By Christina R. Fritsch, JD

As the beginning of the school year approaches and the students are heading back to class, it seems like a good time to share a few lessons on contact and relationship management. One group of 'pupils' for whom this information can be particularly relevant is new attorneys who are joining a firm for the first time and who are eager to get to the head of the class by focusing on marketing and business development early in their careers.

It may seem to many people that contact management skills should come naturally lawyers, for whom relationships are crucial. But, as CRM success consultants, we have trained literally thousands of attorneys on a number of CRM systems and, in doing so, we have found that not all lawyers manage their contacts the same way – or even manage them at all. In fact, today many lawyers don't organize contacts in a centralized system using a tool like Outlook, but instead keep them in a variety of other places like their e-mail or their phones.

While formal contact management may be foreign to younger lawyers, this isn't necessarily a generational issue. In fact, we now frequently find that even some of the most experienced lawyers are managing their contacts in different ways. The issue also isn't caused by inattention or idleness. Actually, there are a number of valid reasons why changes in contact management methodologies have been taking place such as:

- Attorneys are out of the office more often today, so it's critical to have contacts on their mobile devices where they can easily access them
- Advances in search technology have made it easy to find contacts anywhere, so there is no need to add them to an address book
- Websites like LinkedIn provide access to a vast network of business contacts that can be connected to with a just a click
- New software can create contacts from signature blocks of e-mails, so why create a contact card
- Attorneys are busier than ever and entering contacts takes time away from the Client work (aka, it's not a billable activity)

The reasons aren't important, but the challenge for law firms is, because a centralized collection of clean, correct and complete contacts is critical to effective marketing and business development. Additionally, having contact and relationship information outside the firm's central systems and security may present additional problems. As a result, many firms may find it important to get attorneys to develop consistent practices for centralized contact management.

So, what is the best way for firms to control of the contact conundrum? First, it's important to identify the scope of the problem. Firms can quickly run a report in the CRM system to identify which attorneys are currently sharing contacts. Different approaches may be required depending on whether it's only a few younger associates or a broader group of attorneys.

Identification of the issue is the easy part. The real challenge is changing the behavior. People only change when they see a real benefit – not just for the firm, but for them personally. To get attorneys to take the time to formally manage contacts, you have to convince them that their investment will pay real dividends.

To help communicate the importance of centralized contact management, we have compiled 10 top tips:

1. **Think of contact management as an investment**. Contacts are valuable commodities and investing just a little time up front can pay dividends in the future.
2. **Value your relationships**. For attorneys, there is almost no more important contributor to career success.
3. **Capture complete information**. Without key details, you can't effectively communicate with contacts.
4. **Update contact information regularly**. Up to 30% of contact information changes each year, so it's crucial to keep information current.
5. **It's not difficult or time consuming**. You can delegate it or automate it. The important thing is to do it.
6. **Add notes and activities**. These help you remember important discussions, details and dates.
7. **Communicate consistently with contacts**. Share information, communications and invitations.
8. **Set reminders so you don't lose touch**. Lost connections are hard to rebuild, so follow up with key contacts regularly.
9. **Utilize technology**. There are a variety of systems and tools to help capture and update contact information.
10. **Start today.** It's never too late for attorneys to begin focusing on one of their most important assets, their relationships.

As with most knowledge that is important to impart, effective and ongoing communication and training will be critical. Firms will need to regularly reach out to new associates, lateral hires and any other attorneys who may not be centrally managing their contacts to communicate the long-term value. Fortunately, once attorneys understand how easy contact management can be and the benefits they will receive, most should be happy to learn this lesson.

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