Categories - Categorizing Contacts for CRM Success

Categorizing contacts is an essential element of CRM success. Contacts may be categorized for a number of reasons. Most frequently, the reason is to either include or exclude contacts from a marketing activity such as a mailing or event.

The following is a comprehensive list of potential categories that many firms and organizations use to categorize their CRM contacts. It is not imperative to include all of the categories but rather to select the ones that make the most sense for your culture and marketing needs.

Status

- Accountant
- Adverse Party
- Advisor
- Alumni / Our Alumni / Firm Alumni
- Banker / Finance / Lender
- Board Member / Director
- Client / Top Client
- Co-Counsel
- Competitor / Adversary
- Conflict
- Consultant
- Expert / Expert Witness
- Employee / Firm Employee / Personnel / Firm Personnel
- Financial Institution
- Government / Federal or State Government / Government Official / Government Personnel / Elected Representative/ Legislator / Political / Politician
- Judge
- In-house Counsel
- Law Firm / Attorney
- Lobbyist
- Media / Press
- Private Client Group
- Prospect / Top Prospect
- Referral / Referral Source
- Underwriter
- Union Representative
- Vendor / Service Provider
- VIP

Location

- Additional Locations
  - Add list of states
- Counties
- Office / Firm office associated with
- Summer / Winter alternate addresses

Industries

- Add key industry information
  - □ Use list of most frequently represented industries or SIC or NAICS codes

Areas of Law / Practice Areas

- List of Practice Area / Group names

Communications

- List of firm and group communications. Examples include:
  - □ Alert
  - □ Client Alert
  - □ Newsletter
  - □ Holiday Card
  - □ Holiday Gift
  - □ New Attorney / Partner Announcement

Events

- List of firm and group regular or recurring events. Examples include:
  - □ Open houses
  - □ Office openings
  - □ Seminars / webinars
  - □ Parties
  - □ Sports events
  - □ Golf events
  - □ Cocktail receptions
  - □ Dinners / meals / cocktails
  - □ Networking events

Relationship Attorney

- List of relationship partners or other attorneys

Titles / Positions / Roles / Job Functions

- Attorney
- Board Member
- C-level executive
- Officer
- Director
- HR
- Human Resources
- Government
- Law firm

Communication Preferences

- Do not contact
- Send no mail
- Send no e-mail

- Send no communications
- Bounced / bad e-mail
- Send no invitations

Additional Categories

- Acquired / merged
- Parent / subsidiary
- Deceased
- Retired
- Inactive
- No longer with company / no new address
- To be researched
- Verified
- Newly created record