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	356 E 19th St # 1	New York
	641 Broadway	New York
	51 University Pl # 2	New York
	138 E 13th St	New York
	335 E 9th St	New York
	755 Broadway	New York
	169 1st Ave	New York
	40 Union Sq E # 1	New York
	60 Broad St # 4	New York
	7 Hanover Sq # 6	New York
	7 Hanover Sq # 4	New York
	26 Broadway # 708	New York



DO IT YOURSELF CUSTOMER DATABASE GUIDE

How to work with your own customer database

1. How to ... Start or set-up your customer database.
2. How to ... Format your database
3. How to ... Importing/Exporting data into your database
4. How to ... Use Headings or fields in your database
5. How to ... Update your Database
6. How to ... Clean your Database
7. How to ... Remove Duplicates from your database
8. How to ... Get your data ready to send to a mailing house
9. How to ... Do a Mail merge and create mailing labels

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How to ... Start or set-up your database.

When starting your Customer database decide which software program to use as there are many to choose from.

First ask yourself the following questions:

- What is your budget for a CRM (Customer Relationship Management) Software?
- What information do you want to store in your database?
- Think of Garbage in Garbage out!
- The best place to look for clients is in your own database.
- How many others will be using or sharing the same software or customer database?
- For little cost simply use MS Outlook to store your Contact information and it has most fields you need to start. (See figure 1.)

Sample: MS Outlook Data Base:

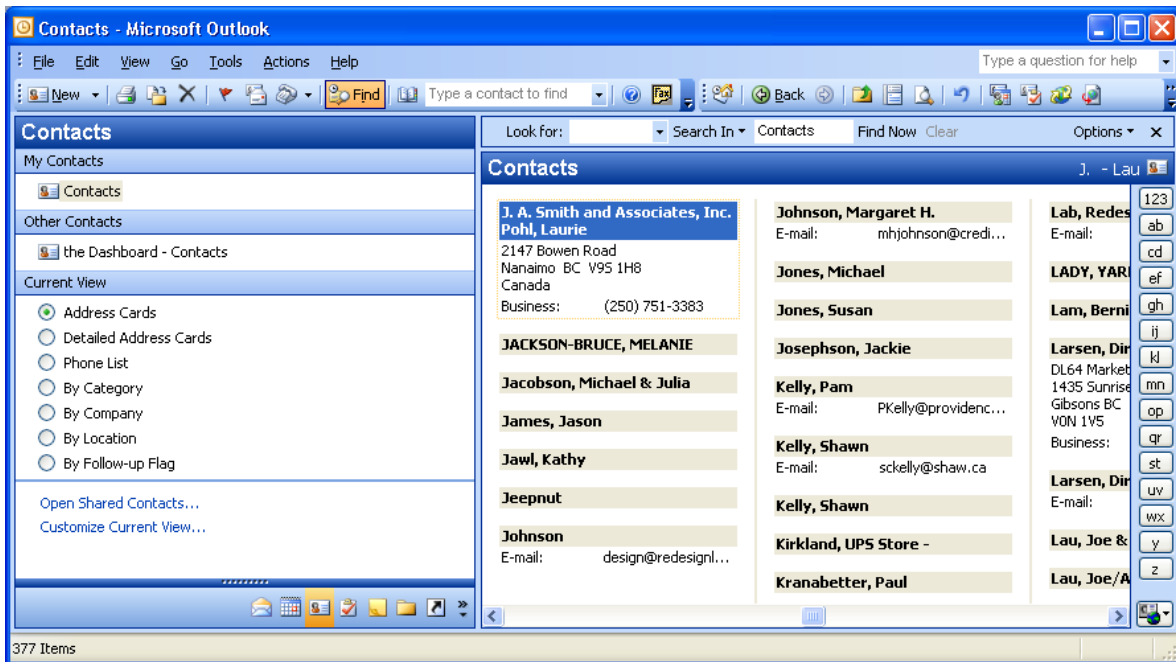


Figure 1.

- What are the easiest programs to use?
- Again MS Outlook or Outlook Express, MS Excel (see figure 2.) are easy programs to use and are easily used to import or export to other CRM (Customer Relationship Management) software programs.

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Sample: MS Excel Data Base:

COMPANY	ADDRESS	CITY	STATE	ZIP+4	PHONE	EMAIL	WEBSITE
CHOWDER BOWL	144 GORE RD	WEBSTER	MA	01570-6814	508-949-7227		www.chowderbowl.com
PAPA GINOS	29 CHELMSFORD ST	CHELMSFORD	MA	01824-3016	978-256-6999		www.papagino.com
JAVAS BREWIN	95 BOSTON RD	NORTH BILLERICA	MA	01862-1348	978-670-0800		www.javasbrewin.net
PAPA GINOS	314 CABOT ST	BEVERLY	MA	01915-3336	978-998-6808		www.papagino.com
OCEAN VIEW INN INC	171 ATLANTIC RD	GLOUCESTER	MA	01930-4331	978-283-6200		www.oceanviewinnandresort.
DAVADIDE RESTAURANT	326 COMMERCIAL ST	BOSTON	MA	02109-1124	617-227-5745		www.daviderestaurant.com
REBECCAS CAFE	56 HIGH ST	BOSTON	MA	02110-2301	617-951-2433		www.rebeccascafechicago.cc
MAMMA MARIA RESTAURANT	3 NORTH SQ	BOSTON	MA	02113-2404	617-523-0077		www.mammamaria.com
LEGAL SEA FOODS INC	1 SEAFOOD WAY	BOSTON	MA	02210-2702	617-530-9000		www.legalseafoods.com
BERTS COVE	P.O. BOX 960	PLYMOUTH	MA	02362-0960	508-746-3330		www.cjsenterprises.com
STARWOOD HOTELS & RESORTS	727 MARRETT RD	LEXINGTON	MA	02421-7311	781-862-8700		www.starwoodhotels.com

Figure 2.

Five simple database marketing techniques to break that feast-or-famine cycle for good:

- Practice good database hygiene.** No matter how busy you are, be sure to enter every new customer and prospect name into your database, along with their title, company name, phone number, fax number, cell number, postal address and e-mail address. Then, every time you touch base with a customer or prospect, make a note in your database so that you'll have a running log of your e-mails.
- Create a prospecting pyramid.** To get the most out of your database marketing efforts, organize your prospecting list into a pyramid, with the hottest prospects at the top and the coldest prospects at the bottom. This way, you can devote the most time to the prospects that are most likely to buy from you and not waste your time on people who are likely to say no.
- Create a sales forecasting pipeline.** Once you've started mining your database, you can start to get a better handle on which customers are going to buy from you and when. To keep track of pending sales, simply take an Excel spreadsheet, label it with the current month and divide the page into 28, 30 or 31 squares. As potential projects come in the door, type the client's name, type of project and expected dollar value in the square representing the day that you think the job will come in.
- Send out a weekly newsletter.** One of the easiest and most cost-effective ways to keep in touch with your clients is by sending out a weekly e-mail newsletter. This newsletter should go not only to your existing customers, but also to prospects, previous customers and people you meet at trade shows or networking events.
- Make prospecting a priority.** No matter what else comes up, be sure to set aside at least an hour each day for prospecting. For some people, it's the first thing they do after they finish their morning coffee. For others, it's right after lunch or before they leave for the day. The important thing is to pick a time and stick to it.



While none of the previous techniques can guarantee you success if you've got a service that nobody wants or needs, the database marketing strategy I've outlined will ensure that you stay in constant touch with your customers and that you'll have your ear to the ground to detect the newest trends and changes. Remember that a "no" could also mean "not now" and that the time and effort that you spend on database marketing today will pay big dividends in the future.

How to ... Format your database

There are quite a few formats for importing and exporting your database; from ascii text, csv text (comma separated value), MS excel, dbf (database format). Different CRM software programs will suggest the best format to use to import or export your data. The most common formats today are csv and MS Excel. We will show you how to format your data.

How to ... Importing/Exporting data into your database

Once you have your data formatted into the format to import it into your CRM database you will need to ensure the headings from both match exactly otherwise they will not import correctly otherwise you will have a lot of work after to correct your database. We will show you how to import and export your data.

How to ... Use Headings or data fields from your database.

You may want to have additional headings or field names that are specific to your business along with the regular contact headings. Depending on what you sell or how you follow up with your clients. You can create reports using the headings you have created.

Sample Database Header fields in a report:

Purchase Date		Month							
Qty		Payment Amount		Data					
Payment Type		Car Name		January 2002		February 2002		Grand Total	
		Qty	Payment Amount	Qty	Payment Amount	Qty	Payment Amount		
AmEx	Cadillac: DeVille			10	\$477,800.00	10	\$477,800.00		
	BMW: 530i	2	\$78,900.00	14	\$552,300.00	16	\$631,200.00		
AmEx Total		2	\$78,900.00	24	\$1,030,100.00	26	\$1,109,000.00		
Master	BMW: 530i			8	\$315,600.00	8	\$315,600.00		
	Cadillac: DeVille	2	\$95,560.00	5	\$238,900.00	7	\$334,460.00		
Master Total		2	\$95,560.00	13	\$554,500.00	15	\$650,060.00		
Visa	Cadillac: DeVille	1	\$47,780.00			1	\$47,780.00		
	BMW: 530i			12	\$473,400.00	12	\$473,400.00		
Visa Total		1	\$47,780.00	12	\$473,400.00	13	\$521,180.00		
Grand Total		5	\$222,240.00	49	\$2,058,000.00	54	\$2,280,240.00		

Figure 3.



How to ... Update your Database

Referrals or word of mouth is always the best way to grow your business. From time to time you will need to update or add to your database to get new clients if you are to continue growing. For instance when you add a new product or hire more sales people you will want new leads for them to contact. Contact your list broker to rent or purchase new leads to freshen up your database.

How to ... Clean your Database

People are always moving and changing employment so you will want to keep your database up to date with current contact and address information. If you target businesses you will need phone them to verify their information is correct this also gives you a good reason to touch base! If you target consumers there are many ways to clean your database. You must verify addresses and enhance contact data is correct and standardize address, phone, email and names. See also How to get your database ready for a mailing house.

How to ... Remove Duplicates from your database

Many times when you are sharing databases you will get duplicate entries in your database. You want to merge the two duplicates if they each have pertinent information. You need to remove duplicates so you don't enter differing information in each and miss current information. You also don't want to send two mail pieces or emails to the same person. Again, it wastes time and money and you will not look professional.

How to ... Get your data ready to send to a mailing house

The following is recommended for any mailing list that has not been updated in over a year. Identify movers in your list and update their address information - before you mail scrub against NCOA. Over 43 million individuals, families and businesses move each year. *Move* updating your mailing list will ensure deliverability, reduce waste and is now mandatory for all Standard Mail. This means that addresses must be updated within 95 days prior to mailing to qualify for discounted postage rates. Another regulation that USPS mandates is CASS™ certification and if you are sending your data to a mail house they will require a CASS and NCOA report to verify the last date your data was updated before they continue.

Features and Benefits

- Reach more of your customers by obtaining their current address
- Identify undeliverable and incomplete addresses
- Cut your mailing costs and qualify for postal discounts
- Increase postal processing efficiency & delivery

How to ... Mail merge and Create mailing labels

Create and merge your mailing list into letters, onto labels or directly onto your envelopes with a return address. Whatever you need for your do it yourself mailing we will show you how to do it yourself.