

Database Gold

How to create, grow and manage your customer database for maximum results.



a guide for Realtors, Lenders
and Small Businesses



customer database

[kuhs-tuh-mer dey-tuh-beys]

[noun]

a list of customers in any format that can be developed and mined to drive new business and referrals. These are people who know you, trust you and would willingly, even gladly, refer you. They simply need to be reminded – convincingly and consistently – that you are a professional in your field.



WHY FOCUS ON YOUR CUSTOMER DATABASE?
BECAUSE RELATIONAL SELLING IS PRETTY MUCH

everything

- 84% percent of buyers start the buying process with a referral.
- 9 in 10 buying decisions are made with peer recommendations.
- 92% of buyers trust referrals from people they know.



< 29% of customers
give referrals

AND YET, after a
positive experience,
83% of customers
would be happy to
provide one.

Salespeople simply
aren't asking!



WHETHER YOU ARE A REALTOR, LENDER OR SMALL
BUSINESS OWNER, YOUR CUSTOMER DATABASE IS
YOUR BEST BUSINESS ASSET

and there's a good reason why . . .

For every 12 people you stay in
touch with consistently :



you net 2
transactions
direct business or referrals

WHEN I SHARE THESE STATISTIC WITH
POTENTIAL CLIENTS AND THEY DO THE MATH,
THEY ARE IMMEDIATELY ON BOARD.



On board, that is, until it's time to pull their customer database together.
The two most common issues:

#1 “I haven't even started compiling an actual database,” and

#2 “I have a database that lives in my CRM software (Salesforce, Outlook, Constant Contact, MLS for instance), but I have no idea how to harvest a list.”

LET ME ASSURE YOU: IT'S NOT THAT DIFFICULT.

This e-Book is designed to help you build your database from scratch AND export your list and prepare it in Excel for easy & meaningful customer outreach.

If you need more information from a contact to fill in your spreadsheet, that's a great reason to call a contact!

WHAT'S THE STATE OF YOUR DATABASE?

- I'm new and don't have one. [START READING BELOW.](#)
- I have a list but it's not functional. [GO TO PAGE 8.](#)
- My list is good to go. Help me use it. [GO TO PAGE 9.](#)



START

You know more people than you think you do. Make a list of anyone and everyone you can in a simple Excel workbook. Use these fields:

NAME	STREET ADDRESS	CITY	STATE	ZIP	EMAIL	PHONE	NOTES
Joe Schmoe	123 Main St	Anytown	TX	78248	joe.schmoe@email.com	123-456-7891	uncle Joe
Mary Lou	456 High Ave	Anytown	TX	78248	mlou@email.com	123-456-7891	neighbor

AIM FOR AROUND 100 PEOPLE

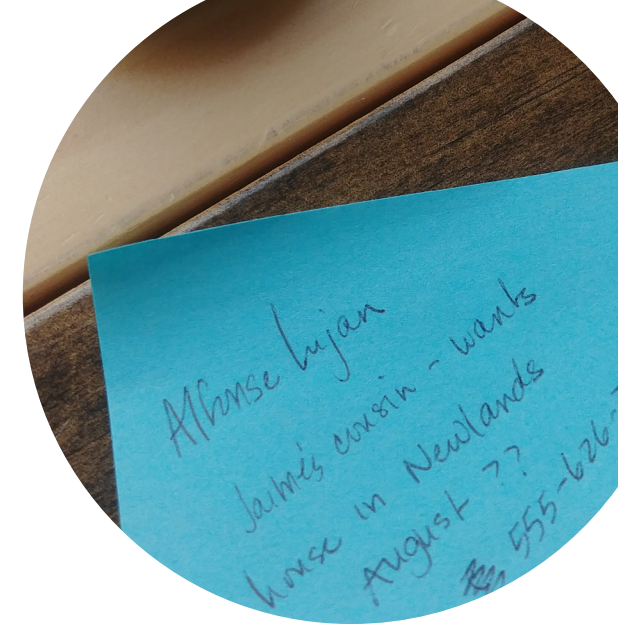
- Family (any and all)
- Family Friends
- Friends-of-Friends
- Gym or Sports Acquaintances
- Past Workmates
- Past Coaches
- College Professors or High School Teachers
- Rotary or Other Club Contacts
- Personal Vendors: Personal Trainer, Doctors, Accountant, Hair Stylist, etc.
- Facebook Friends
- Instagram Followers
- Email Contacts
- PTA Parents
- Kids' Teachers
- Kids' Coaches
- Parents of Kids' Friends, Teammates, Classmates, etc.
- Church Acquaintances
- Volunteer Acquaintances

Now Connect

Let the people on your list know about your business. Write an introduction on letter-head, and include your business card. Follow up with a phone call. Ask for referrals!

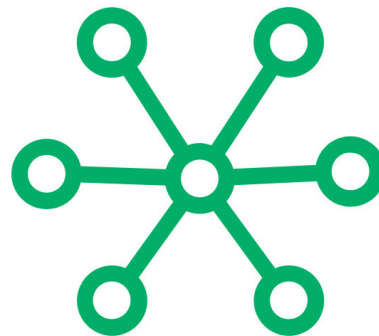
"I always have time to help you, your family or your friends! Call me anytime."

YOU HAVE GOOD CUSTOMER INFO, NOW PUT IT INTO A FORMAT THAT'S USEFUL.



CONSOLIDATE

If your customer information exists in disparate places (your computer, phone, email system, scratch paper around the office, etc.), take a few hours to transcribe everything into one Excel spreadsheet. (see example on page 7.)



GET HELP

Not much of a typist? That's ok. We have data entry resources that are accurate and reasonably priced. (We've had many clients bring us photographs of scratch paper with handwritten names & addresses. We've consolidated these into robust Excel spreadsheets. We can help you too.



IF YOUR CUSTOMER DATA EXISTS IN YOUR CRM SOFTWARE OR OTHER PLACES, IT'S A LITTLE MORE COMPLICATED

..... BUT NOT MUCH!

Where does your customer data live?

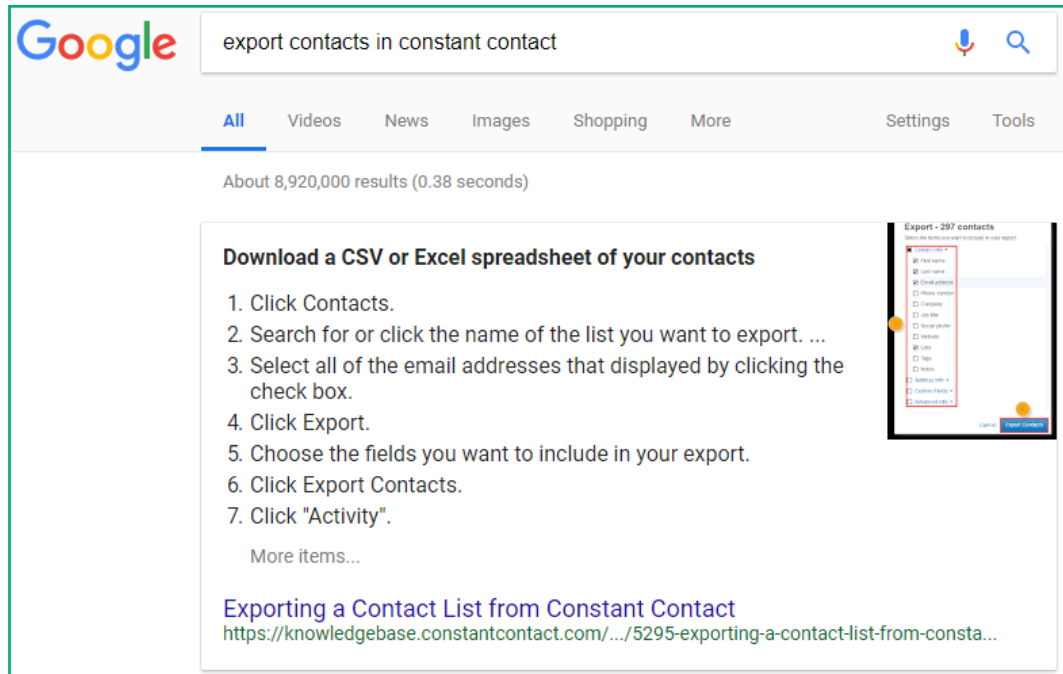


..... and many more

To get your customer data out of these programs so you can use it for another channel (like direct mail marketing or detailed note taking, for instance), you need to EXPORT or DOWNLOAD your contacts into an Excel spreadsheet. Every program allows this. Every program does it differently. The solution, of course, is Google.

HERE'S YOUR SEARCH QUERY IN GOOGLE: "EXPORT CONTACTS IN (PROGRAM)"

Google answers with step-by-step instructions for just about any program.



The screenshot shows a Google search interface with the query "export contacts in constant contact". The search results page displays "About 8,920,000 results (0.38 seconds)". The primary result is a guide titled "Download a CSV or Excel spreadsheet of your contacts" with a list of seven numbered steps: 1. Click Contacts. 2. Search for or click the name of the list you want to export. 3. Select all of the email addresses that displayed by clicking the check box. 4. Click Export. 5. Choose the fields you want to include in your export. 6. Click Export Contacts. 7. Click "Activity". Below the steps is a "More items..." link and a blue link titled "Exporting a Contact List from Constant Contact" with the URL "https://knowledgebase.constantcontact.com/.../5295-exporting-a-contact-list-from-consta...". To the right of the text is a small thumbnail image showing a screenshot of the Constant Contact interface with a red box highlighting the "Export Contacts" button and a list of fields to be included in the export.

SMILE. YOUR CUSTOMER DATABASE IS IN NOW IN EXCEL*, AND UNDER YOUR CONTROL.



It lives on your computer.



An Excel spreadsheet is a simple yet powerful way to centralize, add, delete, sort and manage your customer data.



It's easily uploadable (again and again, as you update it) to your CRM, email marketing program, and direct mail vendor.



It's great for note taking, so you can remember client conversations, birthdays, referrals and more.



Your data is centralized and under your control.

IMPORTANT: BACK IT UP. USE AN EXTERNAL HARD DRIVE OR CLOUD STORAGE SERVICE.

KEEP IT CLEAN

NAME	STREET ADDRESS	CITY	STATE	ZIP	EMAIL	PHONE	NOTES
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CONTACT YOUR CUSTOMERS PERIODICALLY.

In addition to being a great reason to call, this is the best way to find out if anything has changed.

SEND A POSTCARD WITH FIRST CLASS POSTAGE.

Mail sent to people that have filed a change of address form will be returned to you with a yellow sticker that includes a forwarding address.

ALLOW US TO HELP.

We offer services designed to cleanse and process customer data. From postal address standardization and email address verification, to change of address data, you can trust us to help keep your data clean!

NOW PUT THAT LIST TO WORK

In addition to providing your clients with excellent service, it's imperative to stay in constant touch so they will think of you when they need a professional. Smart direct mail marketing is one of the most effective ways to do just that - and solidify your position as the person they trust and recommend!

Use Your List to Establish Routines for Consistent Customer Outreach



handwritten notes



relevant phone calls



coffee & lunch dates



seasonal gifts



Once a Month Direct Mail Postcards and Opportunistic Just Listed/Just Sold Postcards (don't mind if we do!)



THANK YOU



We are grateful for your time and attention! We hope our e-Book has provided you with the motivation to use relational selling to build a very successful business, and a few tools to do it well! At Reaching Neighbors, we are experts at helping Realtors, Lenders and Small Business Owners stay in touch with their customers through smart direct mail. Our postcard programs are consistent, professional and extremely easy to use. Contact us to learn more: ReachingNeighbors.com.