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# Data You Should Know About Every Customer

If you're selling B2B, this is the information you absolutely need. Part 1 of 2.  
By **Pam Baker** on **March 20, 2008**

***Editor's Note:** In this two-part series, experts reveal the best-kept secrets in maximizing CRM results while minimizing liabilities in both the B2B and consumer realms. (Part 2 immediately follows this Part 1 segment below.)*

CRM is widely viewed as the best and most efficient way of tracking customers and leveraging contacts. Though aware of CRM's abilities, many users do not know what specific **data** they should track to increase sales and still avoid the snares of **privacy** invasion and customer-**identity theft**.

## The Basics

A good rule to follow in the **B2B** universe is remembering to track both the person and the position in order to maintain contact with a customer after a staff **turnover**. This allows you to follow the exiting contact to his or her new position. Most companies follow only the person or the position and miss the opportunity to add to their marketing bases with every staff shift.

To aid with this tracking, many companies are **combining** contact managers with CRM products. "I have used a lot of CRMs, such as **Act!**, **GoldMine** and **Salesforce**, but I am actually using a Microsoft plug-in now called **Business Contact Manager**. It's just a bigger contact manager in Outlook," said Chris O'Hara, senior vice president at **Reviewed.com**.

Whether you elect to use **straight CRM** or try a contact-manager/CRM combination, you still need to collect the right data. The 10 most essential pieces of information, according to O'Hara, are industry, company name, title, source of contact, rating, spend level by year, contact information and preference, an assistant's contact information, a second contact, and the most recent date of communication.

## Bonus Data

Stuart Watson, vice president of emerging media and technology at **Camelot Communications Group**, a media and marketing agency based in Dallas, said he would include historical data as well. "I would add company-name history, so you can pull up any previous company employment and decision person, which clarifies if this person is one of the key people making purchase decisions or if someone else in the organization is," he said.

For cross-**marketing** purposes, such as establishing a path to connect with an elusive prospect, you might want to collect a few more pieces of information. "Other organizations and associations they belong to can be very helpful," said Cary SueLavan, vice president and banking-center manager at **Midwest Bank and Trust Company** in Chicago.

## Consent Counts

There are also a few data points you can add to lessen your liability. "I will just add as [the] No. 1 item the customer's **consent** to use their personal data for sales, service and marketing purposes, including contacting

them, and their preferred contact method, channel and time,” advised David McNab, president of **Objective Business Services Inc.**, a boutique consulting firm based in Markham, Ontario.

“Perhaps your respondents assumed privacy and choice information was included already. I believe it is too important to be implicitly assumed. In fact, in Canada it is not legal to do so; opt-in is required to be explicit,” he warned.

McNab's point is important: Just because you want or need the data does not mean you are entitled to collect it. Laws vary from **country to country** so make sure your data collection measures up accordingly. Remember it is a twofold problem: You must adhere to regulations governing the data-collection process and laws that restrict who you can share the data with – even staff in your company.

## And Now for Part 2....

# 10 Pieces of Data You Should Know About Every Customer

Using CRM to better understand your consumers? Here's what you need to know about them.  
By **Pam Baker** on **March 31, 2008**

**Editor's Note:** *In this two-part series, experts reveal the best-kept secrets in maximizing CRM results while minimizing liabilities in both the B2B and consumer realms. Read the first part of this article, “**Data You Should Know About Every Customer.**”*

Tracking information about businesses is often less treacherous than tracking that of consumers. Collecting consumer data is considerably more personal and therefore more **dangerous** if the information should fall into the **wrong hands**. “This practice of personal-data collection opens up huge corporate risk since this is practically the data recipe for **identity theft**,” warned David McNab, president of **Objective Business Services Inc.**, a boutique consulting firm based in Markham, Ontario.

“I strongly disagree with using identifiers of that nature. In fact, use of the equivalent of the U.S. Social Security number in Canada by anyone other than the government for any purpose carries a fine of \$500 per number per use — statutory penalty,” he added.

That said, and assuming you are well-versed in all applicable privacy laws and well-armed against **data thieves** and hackers, what data should you collect to maximize sales and leverage contacts with consumers?

It depends upon whether you deal with consumers one-on-one or interact with them solely through a **contact center**. More face time with customers translates to a need for more personal contact. “I would add to data collected on customers their favorite wine, chocolate and flower — you may want to celebrate a milestone or make an apology,” said Cary Sue Lavan, vice president and banking-center manager at **Midwest Bank** in Chicago.

### Refer Madness

Make sure to stay updated on customers' wants so that you can **refer** them to other companies. Lavan advised tracking “a customer's wish list, including items or services you do not provide” so that you are able to offer names of companies providing those wish items. A willingness to refer keeps customers relying on you for information and solidifies relationships at every opportunity. If you routinely make referrals, you are strengthening relationships on both ends — with the customer who needed information and with the company that received new business from your referral.

Obviously, if your only communication with a customer is through a contact center, then company policy will dictate response more than the clients' personal taste in flowers.

### Must-Have Data

Beyond minor tweaks to match the data to your style of contact, here are 10 pieces of information you should have about every customer:

1. Name, including any nicknames
2. Complete business information, such as company or employer's name; address including ZIP code; and numbers (landline number including extensions or direct number, fax number and cell-phone number)
3. Email addresses
4. Preferred means of contact
5. Customers' purchase history, including shipping addresses, to help determine which purchases were gifts and which were personal
6. Gender and birth dates to help you acknowledge birthdays and tailor offerings
7. Source, to track from where the customer came
8. Anniversary with spouse, company or start of business with your company
9. Names of spouse (or significant other), children and favored pets; favorite hobby, sports team and organizations they belong to including online groups like **LinkedIn** and **Facebook**
10. A list of known wants to help match your offerings to a specific desire

## **Cancel the Credit Card**

As for credit-card information, skip it. There is no guarantee the customer will use the same card on the next purchase and it is simply too risky for your organization to keep it on file. The same applies for any information that aids identity thieves such as place of birth, Social Security number, mother's maiden name and additional numbers from credit cards or checking accounts.

"Caution should be a watchword — ensure you are compliant with both the letter and spirit of all relevant law and customer agreements when using customer data ... you only need to mess this up once to be out of business," advised McNab.