Best Way to Organize Your Contacts

By Sally J. Schmidt | Oct.21.14 | Business Development, Daily Dispatch, Legal Marketing, Play to Win

If you are like most lawyers, you have done little to organize or manage one of your most important business development assets — your contacts. Why is it so important to keep track of the people you know?

Most clients will tell you they hire the lawyer, not the law firm. Even as corporate clients become more businesslike in vetting and selecting counsel, there is usually a relationship that led to being put on the shortlist.

To be successful at developing business, you must know people and maintain key contacts — either those hiring legal counsel or those whom they ask for recommendations. Many lawyers will throw up obstacles for themselves in this regard, with thoughts like, “I’m an introvert” or “I don’t know a lot of people.” But the truth is:

1. You will meet a lot of people over your career, through your schooling and in the course of your work.
2. It is very easy to lose track of people over time.

There are two parts to contact management: organizing the contacts into a useful form, and managing and tracking those contacts. Here’s my advice on the best way to get started.

1. Organizing Contacts

Typically, I suggest spending some time organizing a master list of important contacts. You will not use this list to blast newsletters or send holiday cards, and you will not start calling them all for lunch. The process is meant to remind you of people who might be helpful to you (or vice versa) in the future, or with whom you would like to reconnect.

Your list could include:

- Past and present clients
- Past and present referral sources
- Potential clients
- Former colleagues
- Co-counsel and friendly opposing counsel

- Undergraduate and law school contacts (alumni and professors)
- Industry or professional acquaintances (e.g., executive directors of associations)
- Political, community or social acquaintances

Is this task onerous? Possibly. Is it worthwhile? Absolutely. I cannot tell you how many times lawyers have told me what a useful exercise it turned out to be. For example, one lawyer recently identified four people she knew quite well who had gone in-house since she had last made contact.

This exercise is important because it will allow you to focus your time and efforts on the people who make the most sense for you — rather than doing what you've always done, or simply responding to invitations.

Once your master list is organized, I recommend you identify your top priorities for contact. Good examples for this targets list are:

- Former clients with whom you want to reconnect
- Former classmates now working for companies or potential referring law firms
- People you always liked but from whom you have drifted
- Potential clients you know well but with whom you have never done business

If you have a lot of people on your list, you may want to put them into priority groups based on desired frequency of contact — for example, like this:

- A. Frequent contact (e.g., bimonthly)
- B. Regular contact (e.g., quarterly or semi-annually)
- C. Less frequent or more passive contact (e.g., annually)

2. Managing and Tracking Contacts

Now that you have your master and targets lists, what do you do with them? Imposing some discipline and structure on the process will make your business development efforts more productive.

Put your lists into a format you know you will use, which often means a system you are already using in your practice. Options include:

- Microsoft Outlook
- Microsoft Excel
- Microsoft Word
- The firm's CRM system (e.g., InterAction, ContactEase)
- Evernote

Next, for your top-priority contacts, identify the desired frequency of contact and create an action plan. If it's a former client you want to reengage, perhaps you start with a goodwill visit to the company, followed by social outings in the future. If it's a law school classmate who might be a good referral source someday, you could plan to schedule quarterly lunch or drinks.

These activities should be entered into your calendaring or management system (using, for example, Outlook calendar reminders).

Three Ways to Keep Contacts Fresh

Once you have organized your contacts and set up a process to manage and track them, don't let your work go to waste.

- **Keep your targets list handy.** Tape the names of your top-priority contacts to your credenza or keep the list in your top drawer so you see it often.
- **Calendar a weekly or monthly appointment with yourself to review the list.** Remind yourself of your goals and think of reasons to reach out.
- **Revisit your master and targets lists every year.** If you send holiday cards, for example, that would be a good time to review the lists for omissions and assess whether your priority contacts should be changed.

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