Making the case for the contact database
by Barbara Wilmot

As a commercial facilitator, I help market research agencies build new business by fostering more successful relationships with their clients and prospects. Key to this is the development of marketing/business development processes – and the most crucial of all these in my view is the contact database.

But contact databases are hated by virtually every researcher I've known, and I regularly encounter what borders on vitriol whenever the subject is raised with them. This is a quote from a team leader I spent time working with: "I hate it, it's useless and it's too complex to use. Why do I need to do this? It asks for stupid, useless tasks."

I'm amazed that people familiar with conjoint analysis and sophisticated data modelling are flummoxed by a system that requires simple data entry and a few mouse clicks. This does make me wonder if negative views are expressed because a contact database does not involve research tasks – and anything less than research is not considered valid?

In my experience, it is not the software that's at fault. The real problem is one of engagement – not just with the software, but with clients and prospects as well which is necessary if the "data" in the system is to be meaningful and useful. I think so many researchers rebel against actively using the contact database because it forces them to make proactive contact and engage with the clients and prospects when they would rather be focusing exclusively on their research work.

But researchers can no longer afford to be reactive, waiting for the telephone to ring with the next brief. In today's highly competitive marketplace, good work alone is not enough to secure the business relationship. Faced with a plethora of agencies, clients are no longer loyal, preferring to buy on the basis of price and whoever is "top of mind" at the time. So, researchers have to be more proactive about securing existing relationships while at the same time looking to create a pipeline of new business for the future. A contact database is an essential tool for ensuring their success.

Introvert versus extrovert?
The psychometric profiling work undertaken by academics Margerison and McCann suggests that people who score highly on extroversion are likely to be the natural business developers. However, researchers (not only market researchers) have a preference towards introversion when it comes to how they relate to people. Is this the reason why so many researchers seem to avoid proactive contact building with clients and prospects?

Also important and directly relevant here is the fact that the contact database potentially exposes them, making them vulnerable to criticism. This is

because if interrogated, it can indicate to management whether researchers are doing what they said they'd do on the business development front – or not. Yet, if they interacted with the database and used it, it would make business development so much easier for them. It would also enable them to better plan how to develop accounts.

Senior endorsement is essential
With all the emphasis being placed on business development these days, I would have thought management would have realised how contact databases could also help them. For example, selected "fields" in the database allow for the development of reports showing potential revenue and likely conversion of leads and contacts. This is focused and flexible information, available at the touch of a button after some simple configurations of individual requirements. The resultant reports can be far more meaningful for understanding revenue and performance against targets than many of the management reports I've seen to date.

As the data is held in coded fields, it is possible to examine the following types of metrics on a regular basis:

- Likelihood of conversion
- Anticipated revenue
- Likely timing for revenue
- Industry Sector (e.g. Finance etc)
- Source of Contact (e.g. Incoming call etc)
- Status (e.g. Occasional, Lapsed etc etc)
- Result (e.g. meeting booked etc)
- By Director
- By Team

Unfortunately, I don't think there are enough people in our industry, even in senior positions, with the strategic vision to understand the importance and value of the contact database to their organisations. I don't see enough of them getting involved in using a contact database and I think this is because although they may be excellent researchers, they are not experienced marketers. They are also bored by the requirement for the data to be consistently maintained and updated. They probably feel that it is junior or administrative staff who should be using it.

People always duplicate and follow the example of the leader – and the problem for the contact database is that, in spite of the benefits it brings, not being sufficiently endorsed or visibly used by senior management relegates it to obscurity. If the data is not actively used by management, why would any staff member feel the need to comply?

How would using a contact database really help researchers?
A recent discussion at one of my training courses became quite heated when the subject of contact databases came up. The familiar cry was raised: "Why should I do this? It's a waste of my time. I've got proper research work to

do". Once again, I faced the hurdle of how to convince them of the benefits of using a contact management system database.

For the record, I see these as the following:

- It becomes a centralised master file of all client/prospect addresses
- It keeps records of your contacts and meetings you have booked (so you know the current status of each)
- It enables you to make diary notes and set electronic reminders for when to contact different clients and prospects, or if something is postponed
- It facilitates scheduling actions "to do"
- It provides immediate information about a client/prospect to colleagues if you are not in the office

This is single source data so it is easy to manipulate and is likely to be far more accurate than occasional notes written on different bits of paper.

From what I've seen, though, it would need a major culture shift in the industry for the contact database to be adopted actively as an operational system whereby researchers used it as a day to day recording mechanism. So at the end of the day we are still faced with the same situation: client and contact databases that are loved by marketing, loathed by researchers. Where do we go from here……..?

For further information, please contact:

Barbara Wilmot
BW Consulting
Tel/Fax: +44 (0) 20 8997 9914
Email: barbara.wilmot@totalise.co.uk
Web: www.bw-consulting.co.uk

BW CONSULTING
Marketing & Business Development