A Systematic Approach to Maintaining A Professional Network

Objectives

1. Maintain communication with a long list of personal contacts so that you remain at least "known" to them, and hopefully "top of mind"
2. Transition selected personal relationships to business relationships

Note that we are only addressing the first objective in this paper.

Constraints

There are many demands on the time of a busy professional so the main constraint is available time. There are also some limits in the communication options as many of the contacts are based overseas. The solution, assuming that rigour and discipline are welcome, is a combination of:

- **Prioritising** – Segmenting the list to determine the most important people
- **Optimising –** Selecting media that cover multiple people, where appropriate
- **Systemising –** Designing a framework that ensures that no-one is forgotten (and no-one is treated too generously)

Proposed Plan

1. *Establish an Effective Database*

- In the absence of a CRM system, a spreadsheet is adequate for this purpose.

- Ensure that the contact details for each person are current and accurate. Where there are gaps, highlight them and obtain the information at your next interaction.

- Categorise the people in order of importance, with the objective in mind. There are many potential classifications but, for the purpose of this paper, let's assume that there are three categories labelled A, B & C.

2. *Determine the Communication Methods*

- It is imperative to decide what type of communication and what frequency is appropriate for each category. The choice is a function of the category, the available time and the expectations of the people on the list.

- For the purpose of this paper, the following model is proposed:

Category	Phone Calls	Emails
A	1 per Month	1 per Quarter
B	1 per Quarter	1 per Quarter
C	Nil	1 per Quarter

- For illustration purposes, assume that there are 120 people on the list and they are split equally among the three categories (ie 40 in each). The above model would produce the following activity requirements:
  - Approx. 8-10 calls per week for Cat. A and 2 calls per week for Cat. B
  - One email distribution per month

- It is important to diarise time each week to make the calls, otherwise they just won't happen on a regular basis. Block out, say, two hours at the same time each week and work through the list, updating the spreadsheet as calls are completed.

3. *Suggestion for Telephone Calls*

- Consider "good" times for the people being contacted and diarise accordingly.

- These people are also likely to be busy so leave good messages, including a suggestion for a specific convenient time to return your call to avoid playing "telephone tag".

- Remember the purpose of the call, a mix of rapport and business content.

- Note in the spreadsheet the date of the call, any follow up actions and perhaps an indicator of "quality" of prospect (eg hot, warm, cool).

4. *Suggestion for Emails*

- Use the "bcc" option so that there is one distribution list for each category and the addressees cannot see who else is on the list.

- Ensure that there is a message indicating that they are welcome to call to follow up the email (and also an option to be removed from the email list if they don't want any more emails).

- Remember the purpose of the email, a mix of rapport and business content, with an emphasis on the latter.

- Note in the spreadsheet the date of the email, any returned emails (to check the address) and any responses that warrant follow up.

<u>Review</u>

After say 3-6 months it will be valuable to review the plan. Possible modifications include:
- Adjusting the contact frequency, based on either feedback or available time
- Adding or deleting a category
- Revising the category for each person (including deletion!)

At this point it may also be timely to introduce some measures of success for the subsequent quarter. These could be directly related to the plan (eg number of responses generated by each email) or more tied to business outcomes (eg cases referred).