Categorizing CRM Contacts - Part 4: 'Status' Symbols

Another way to categorize CRM contacts is by contact ‘status’ or ‘type.’ This will allow you to better keep track of key individuals, segment your lists and target the audiences that you want to reach – or the ones that you don't.

Status categories may include a number of different types of classifications. For instance, you might want to track types of Clients such as current Clients, former Clients, top Clients or at risk Clients.

You might also want to keep up with prospects the attorneys may be targeting and who could someday become Clients. Additionally, you may want to categorize other contacts who may be able to help you to bring in Clients such as referral sources like accountants or bankers. All of these groups of contacts are the people you want to make sure you include on your communications, share information with and/or invite to firm events.

Then there are the contacts who you categorize in order to exclude. For instance, there may be contacts with whom you don't share firm information or invite to events. These might include adversaries or competitors. Judges might also fall into this category. You may also want to categorize personal contacts to prevent them from being included in the CRM system at all.

Then there are the more functional categories you would use to make it easy to find certain people or companies when you need them. For instance, you may want to identify different types of experts or vendors that the firm uses frequently. You may also assign a category to other types of businesses that may be in the system such as restaurants, hotels or clubs. All of these categories make it easier or more efficient for the attorneys and staff to do their jobs and accomplish firm goals.