



## Create a Customer Database

A customer database can be one your business' most valuable marketing tools. There are many computer software packages available, but before getting started, think through how you will use the data you gather. Here are some tips:

### **Good people and good systems = good database**

Consider what each person in your company wants to do with the information. For example, will you need a phone list of your customers? A report of which customers bought which products? A mailing list to send postcards or newsletters? Based on how you will use the database, you will create and add fields to track information. Remember, a practical, simple, and flexible database isn't a given simply because you utilize a software program; you need people who understand the importance of gathering information, think ahead about how the data will be used, and are dedicated to keeping the information up-to-date.

### **Limit the number of databases you create**

The more databases you create, the harder it is to cross-reference information. If a customer moves, you might have to change his or her information on several separate databases. It's just not time- or cost-effective. Set up just one database for tracking and marketing to your customers. Keep in mind that your accounting staff may need their own database for tracking vendors, bills, and payroll.

### **Include everyone**

The goal is to have your database constantly grow. Anyone who voices an interest in your business—by calling, coming to a sale, requesting information, etc.—should be added to the database. Keep adding new information and updates in a timely manner.

### **Who's in charge**

Everyone at your business should contribute information for the database. However, consider assigning just one person the responsibility of inputting, changing, or deleting information to the database. This cuts down on duplicate records, information conflicts, etc. If more than one person is inputting information, you need to create a category that tracks who made each entry.

### **Universal access**

While one person may be in charge of the database, everyone on staff should have access to looking at and using the information.

## **Create a customer database (continued)**

### **What to track**

What information do you need to know about your customers today, and what information might you need in the future? Here are some suggestions for just a few of the information categories to consider:

- first name
- last name
- salutation
- mailing address
- company affiliation
- job title
- day phone
- evening phone
- fax phone
- email address
- date entered into system
- date information was last updated
- referred by
- participation category/ies (products purchased, events attended, etc.)
- do not contact category

### **Sorting your information**

A good computerized database should allow you to sort and view information in a variety of ways. For instance, you might want to generate:

- An alphabetical list of customers who purchased a particular product
- Personalized letters to customers who have spent over a certain dollar amount
- A sheet of mailing labels for a particular city or county, sorted by zip code
- A phone list of people interested in a specific product or service

### **Design it in-house**

You might consider hiring an outside consultant to help you create your database. But if at all possible, have the person on your team who is going to be using it most participate in the design process. Select the simplest software package that's flexible enough for your current and future needs. Be sure to get the software training you need.

## **Create a customer database (continued)**

### **Security**

Consider having security passwords for different levels of use (one for inputting information, one for designing screens, one for viewing confidential information, etc.). This ensures confidentiality as needed, and prevents staff members who don't know how to use the system from making unintentional, but costly, mistakes.

### **Backup your information**

If your database is computerized, backup the database frequently. Keep these backup copies in a safe place, possibly an off-site location.

### **Removing someone from the database**

Sometimes a person will request to be removed from your database. Instead of deleting the name, consider creating a Do Not Contact category. This will prevent the person's name from being accidentally entered again in the future. Be sure to remove duplicate records from your database, as well as those people who have moved outside of your market area, or who have an undeliverable address.

We invite you to contact Wells Fargo for further information and assistance. Visit our Web site at [wellsfargo.com](http://wellsfargo.com) or any Wells Fargo store.