2. Customer Relationship Management

90 min.

One of the most important things in running a business is the management of your customer relations. By accurately keeping track of your customer data, organizing your contacts and following up on both established and prospective customers, you can quickly adapt to your customer's changing needs and deliver better service. *Microsoft Outlook* is the central program to manage your customer relations.

Business Contact Manager adds additional functionality to *Outlook*. The program enables you to set up marketing campaigns and track their effectiveness for example, or keep track of client-based projects and tasks. With just a few mouse clicks you can create reports and track the history of your accounts.

Regularly updating customer information and entering each action you have taken is essential for customer relationship management. An up to date customer relationship management system is an excellent support for your business activities.

In this chapter you are going to use *Outlook 2007* and *Business Contact Manager*. You will learn the following:

- create and use categories;
- archive documents that belong to contacts;
- create and use electronic business cards;
- organize your e-mail messages in folders;
- search for messages and set up e-mail rules;
- flag and sort messages in mailboxes;
- use search queries and find related messages;
- create accounts and contacts in *Business Contact Manager*;
- keep track of marketing campaigns and opportunities;
- enter projects and project tasks;
- view reports;
- view the history of an account.

Please note:

You need to have some previous experience working with *Microsoft Outlook 2007* in order to be able to do the exercises in this chapter. Please refer to page 15 of this book.

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Please note:

Starting with section *2.9 Business Contact Manager*, you need to have *Business Contact Manager* preinstalled on your computer. You also need to have copied the *Practice Files Office 2007* folder to your computer. See *Chapter 1 Preparation* for more details.

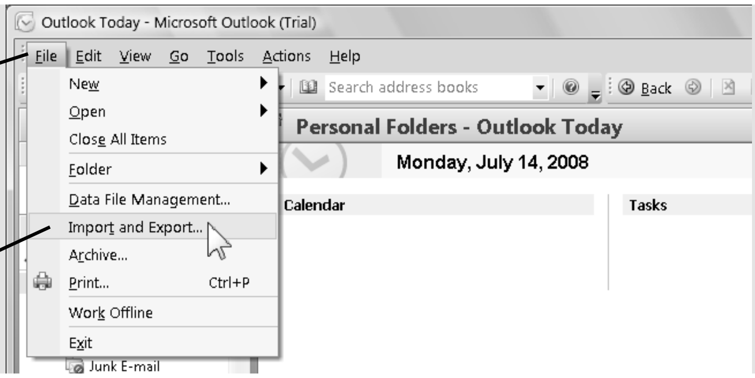
2.1 Grouping Contacts by Category

In *Outlook* you can store various amounts of information about persons and/or companies in the *Contacts* pane. You can group these contacts by category. In this way you can distinguish between personal contacts, customers and other business contacts.
Start by importing the sample contacts from the folder *Practice files Office 2007*.

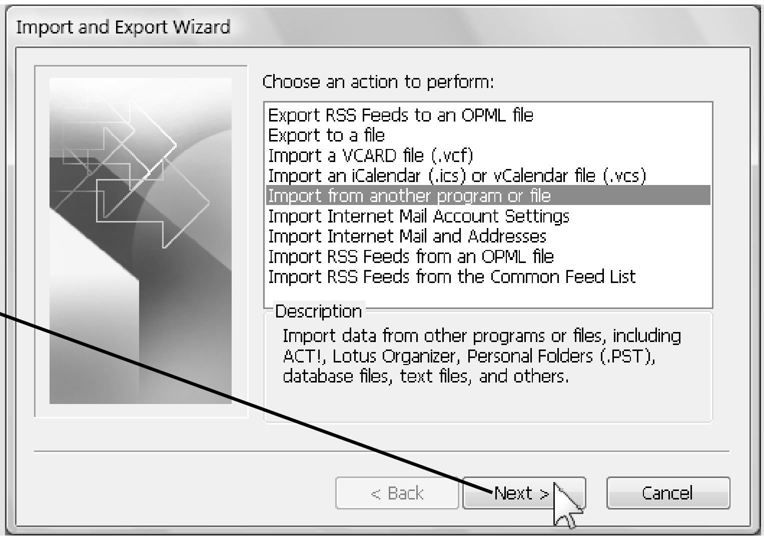
Open *Outlook* 1

Click File

Click Import and Export...



Click Next >



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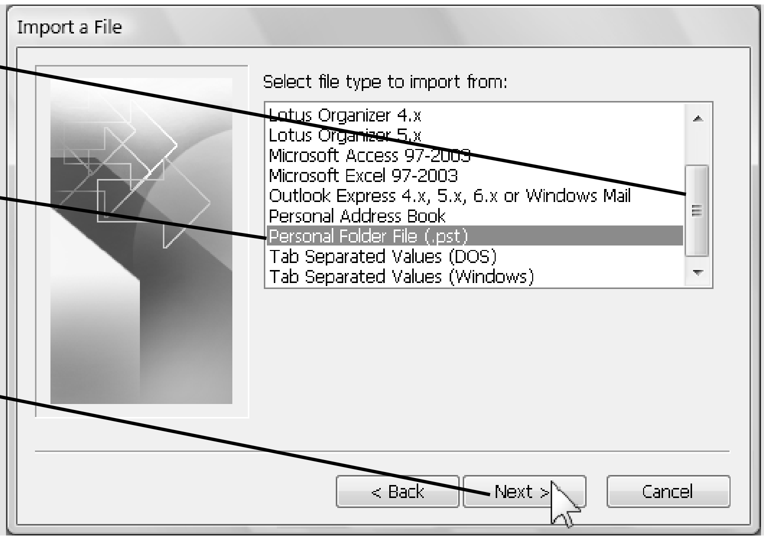
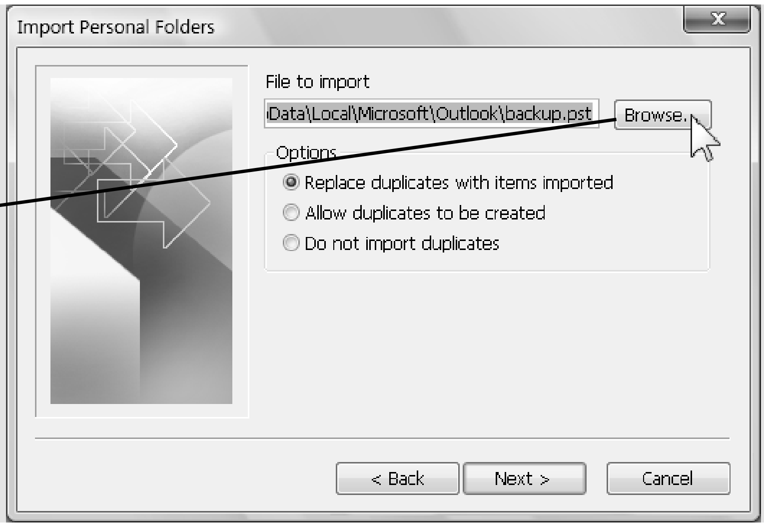
If necessary, drag the scroll bar down

Click Personal Folder File (.pst)

Click Next >



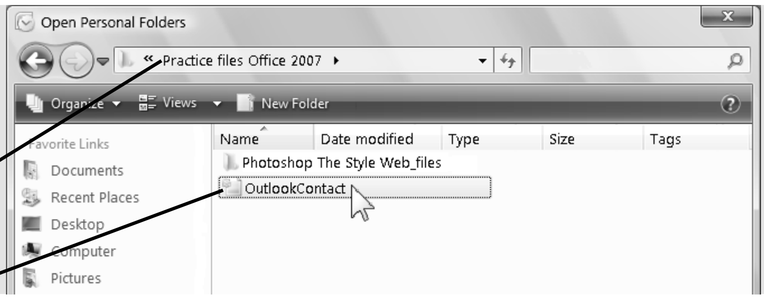
Click Browse...



Open the folder Practice files Office 2007

2

Double-click OutlookContact



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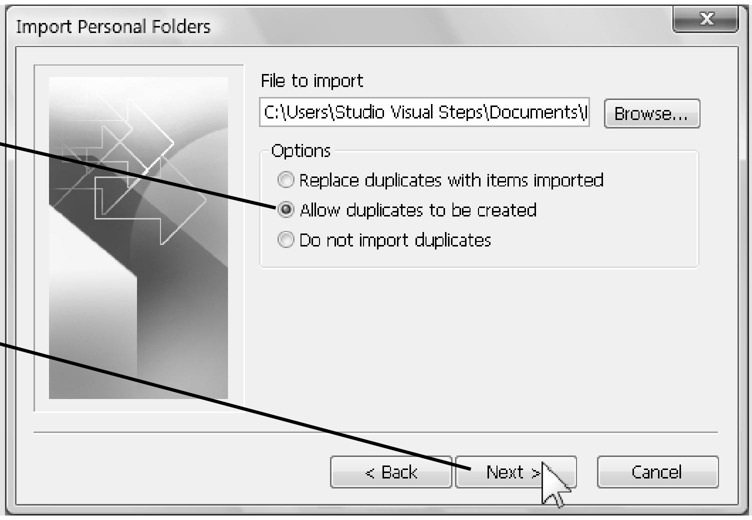
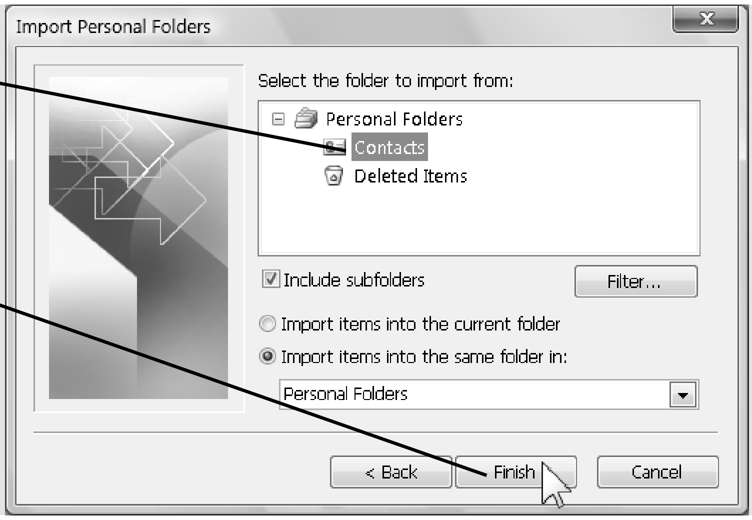
Click Allow duplicates to be created

Click Next >



Click Contacts

Click Finish

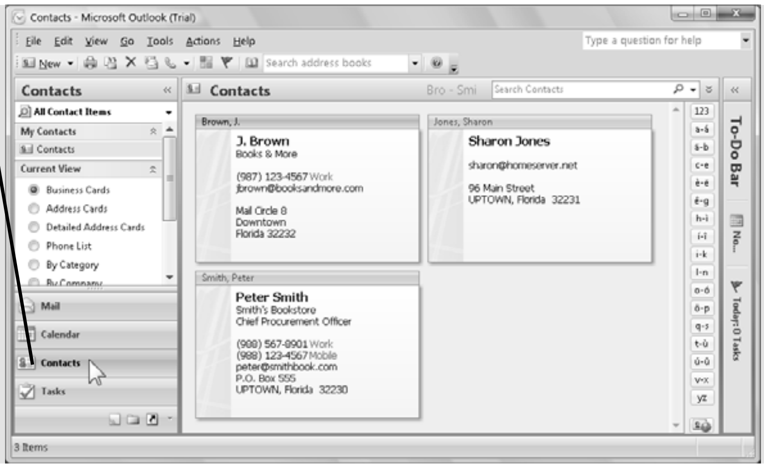


Now the sample contacts are imported.

Click Contacts

You see the contacts you just imported:

If you had previously entered contacts yourself, you will see the imported contacts listed among your own contacts.



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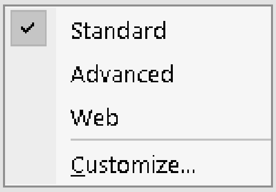
HELP! My window looks different.

To make your window appear the same as in the example shown:

Click View, Toolbars

The menu should look like this



If necessary, close the To-Do Bar **by clicking** ×

If your contacts are not shown in the default *Business card* view:

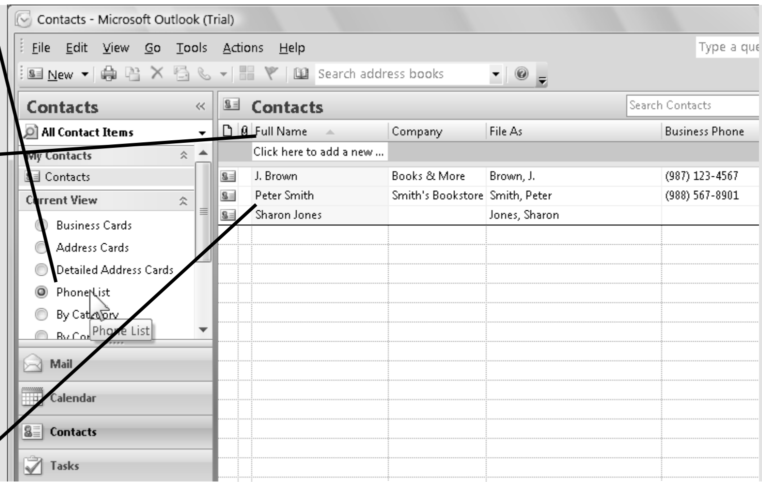
Continue with the next step

You can decide how you want to view your contacts:

Click Phone List

Click Full Name

Now the contacts are displayed in a phone list:



Tip

Displaying contacts

Take a look at the different contact views to determine which view you like best. You can also customize each view by right-clicking a field name, for example Full Name and then clicking Customize Current View... . This makes it possible to group your contacts for instance by company. This is very helpful when you have more than one contact in a company.

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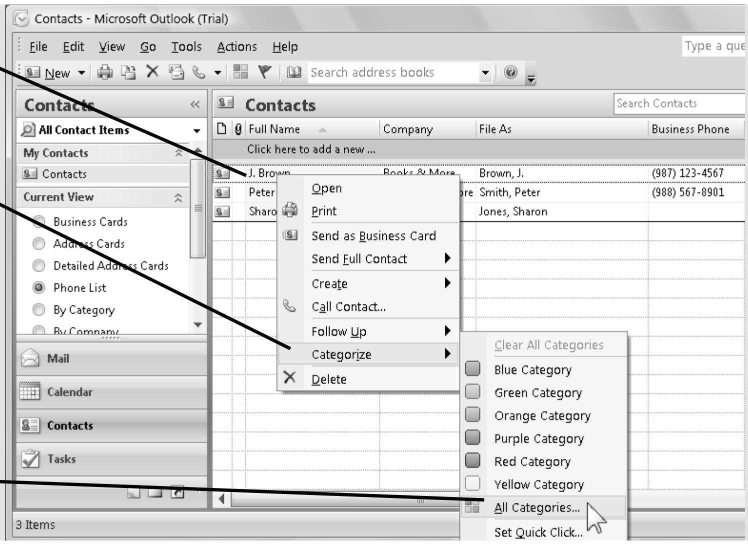
You can also group your contacts by categories you create yourself. To create your own category:

- **Right-click a contact**
- **Click** Categorize

You see the available categories:

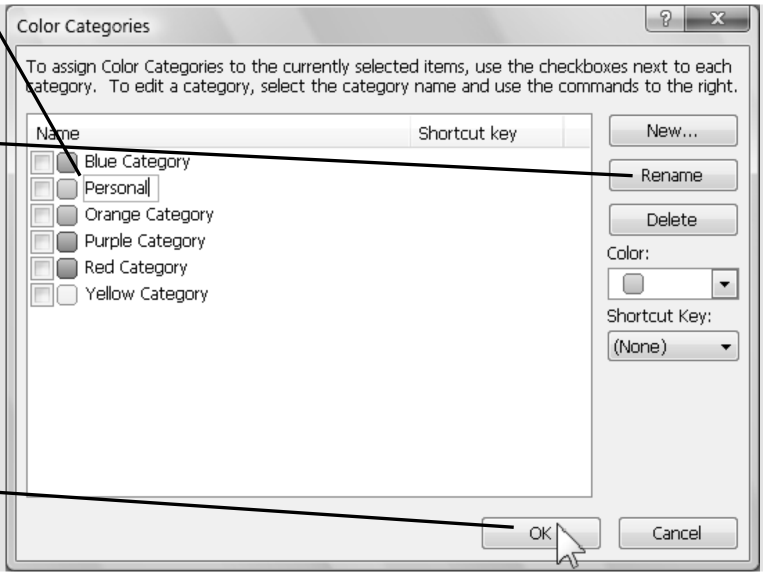
- **Click** All Categories...



- **Click a category**
- **Click** Rename

Now you can change the name of the category:

- **Type:** `Personal`
- **Click** OK



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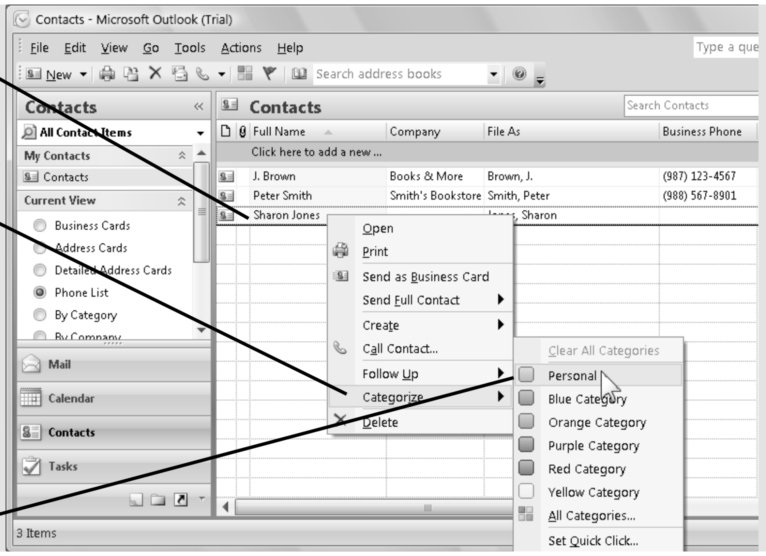
You are going to add a contact to the new Personal category:

Right-click Sharon Jones

Click Categorize

You see the available categories:

Click Personal

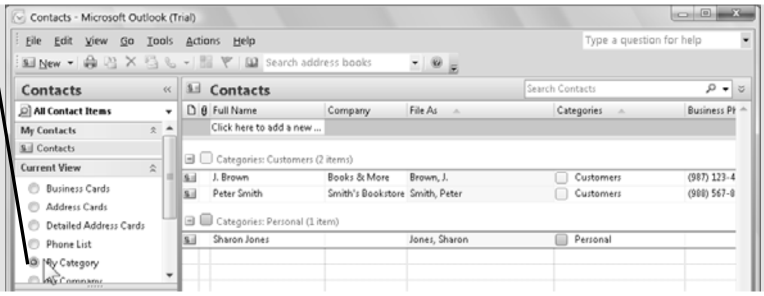


Contact Sharon Jones now belongs to the Personal category.

Create a category Customers 43 and add J. Brown **and** Peter Smith **to that category 44**

Click By Category

Now the contacts are displayed organized by category:



Tip

Categories
Grouping your contacts by categories makes it easier to work with a long list of contacts. For example, you can create these categories:
- Personal
- Customers
- Suppliers
- Advisors

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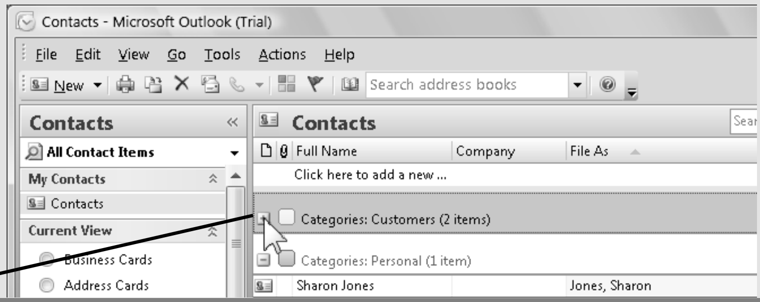
Tip

Hide or show contacts by category
You can choose whether or not to display the corresponding contacts for each category:

By clicking in front of the category, the contacts are hidden. By clicking , the contacts appear again:



2.2 Microsoft Outlook as a Simple Archiving System

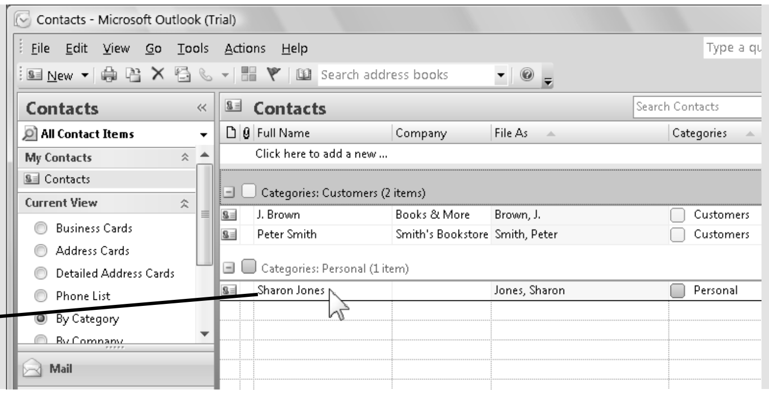
In *Microsoft Outlook* you can archive the documents that belong to a contact in his or her contact form. This enables you to quickly access all of the e-mails, letters, sales quotes and spreadsheets for any of your contacts.

Tip

More extensive customer relationship management with Business Contact Manager
If you have *Business Contact Manager* on your computer, it is better to use that program for your customer relationship management. Further on in this chapter you will learn how to work with this program.

You can link a file to a contact like this:

Double-click Sharon Jones



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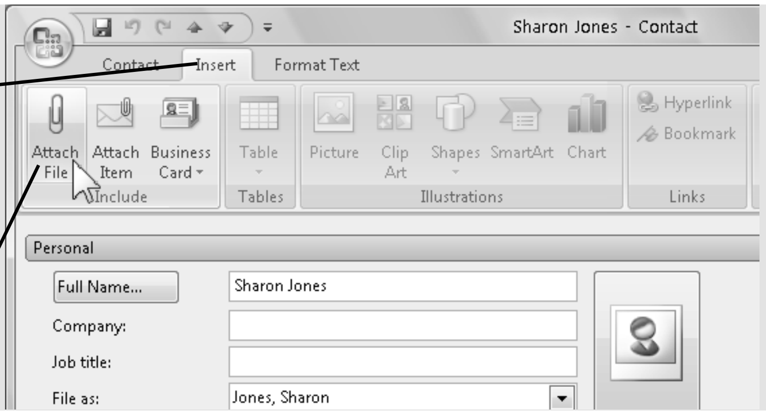
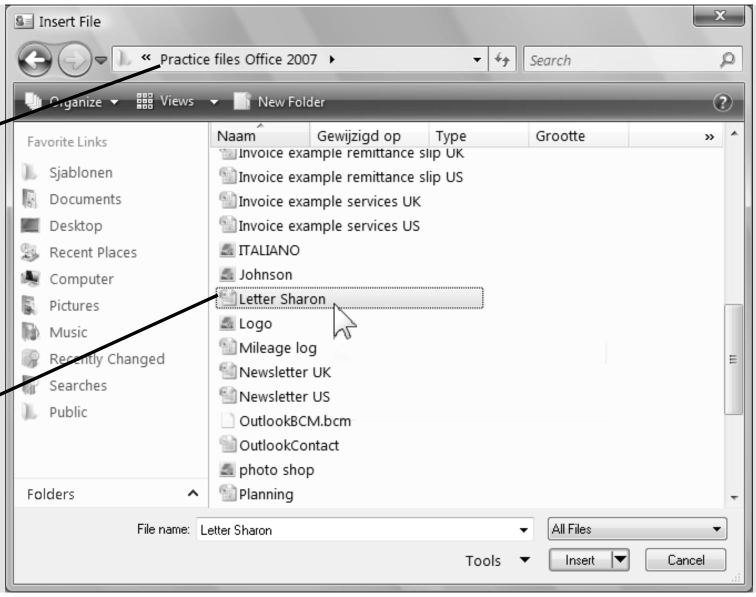
You see the contact form for this contact:



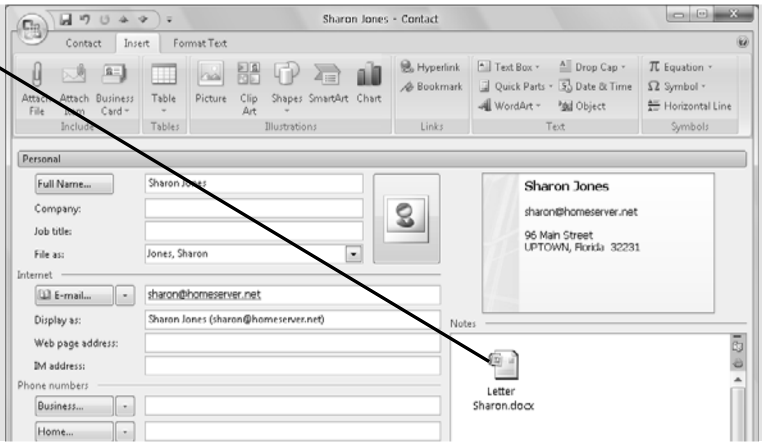
- **Click the** Insert **tab**
- **Click** Attach File

- **Open the folder** Practice files Office 2007 2
- **If necessary, drag the scroll bar down**
- **Double-click** Letter Sharon



You see the shortcut to the file in the contact form:

You can open the file by double-clicking it.



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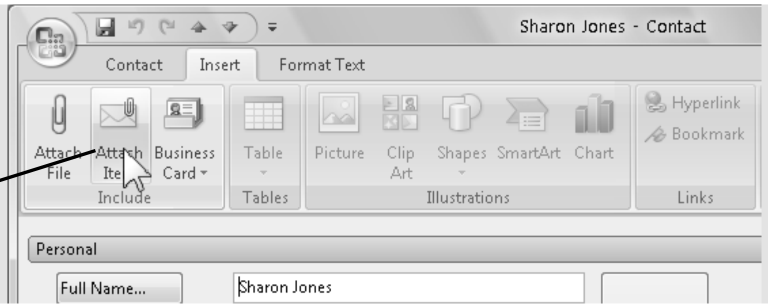
In this manner you can add shortcuts to files on your computer to a contact form. You can add e-mail messages like this:

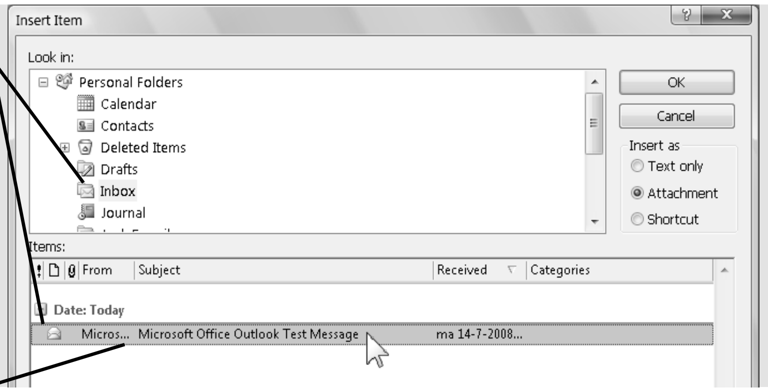
Click 



Here you see the contents of the *Inbox*:

If need be, you can always select a different folder to find a particular message.

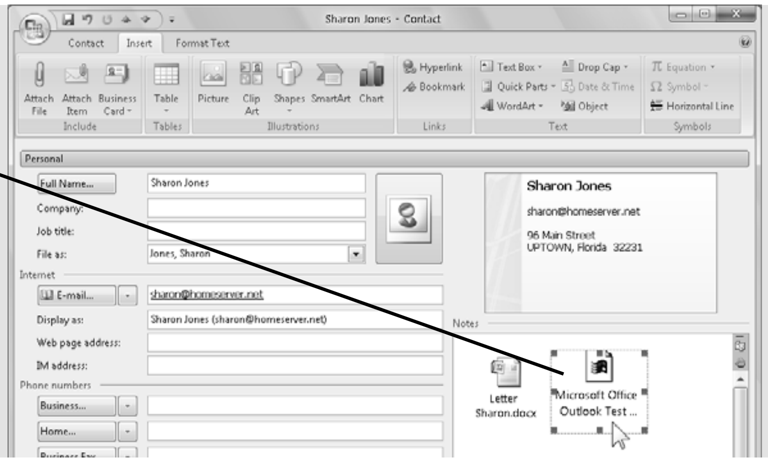
Double-click a message



The link to the message has been added to the contact form. You can also remove a link:

Click the item

Press Delete



The link to the message is removed. The message itself still remains on your computer.

Close the contact form and save the changes 9

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