

# The Clean **D.E.S.K.** Guide to Organizing Your CRM

## OVERVIEW:

*Building and maintaining a contact database can be a lot of work. But, when it's done right, you can use the information within to grow client relationships and scale your business.*

*Print out this handy guide and keep it in your work space, so you can keep your list organized and close more deals.*



Want a more effective CRM? **GET YOUR D.E.S.K. IN ORDER!**

Maintaining a client database can be a lot of work. But, with a little effort, you can have a clean, organized CRM that will help you grow relationships and scale your business.

**Just remember the acronym D.E.S.K.**

<p><b>D</b> <b>Delete duplicate entries.</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Sort your list by name, and check for entries that look similar.</li><li><input type="checkbox"/> Compare contact information to confirm whether these are duplicate entries or simply people with similar names.</li><li><input type="checkbox"/> Contact the client(s) and confirm their current contact info.</li><li><input type="checkbox"/> Condense all the current info into single entries.</li><li><input type="checkbox"/> Delete the redundant entries from your list.</li></ul>	<p><b>E</b> <b>Encourage follow-up.</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Create a field in your CRM or database for "Last Contact Date."</li><li><input type="checkbox"/> Each time you're in touch with a client, update this field.</li><li><input type="checkbox"/> Sort your list by "Last Contact Date," in reverse order, so you can see which clients are overdue for a call.</li><li><input type="checkbox"/> Make note of any actions you need to take.</li><li><input type="checkbox"/> Once you've completed a requested action, reach out again and let your client know.</li></ul>	<p><b>S</b> <b>Segment your list.</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Create three different tiers for your clients: A, B, and C.</li><li><input type="checkbox"/> Make an A-list consisting of your valued clients, past and present.</li><li><input type="checkbox"/> Make a B-List consisting of relevant leads, who have shown interest.</li><li><input type="checkbox"/> Make a C-List of your broader field of prospects.</li><li><input type="checkbox"/> In the notes section, keep track of where you stand with each client and move them up a tier, as the relationship grows.</li></ul>	<p><b>K</b> <b>Keep it current.</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Update your database to reflect all actions taken, including transactions, contact attempts, and referrals.</li><li><input type="checkbox"/> Fill in all fields for each client. (If one isn't relevant, mark it "N/A.")</li><li><input type="checkbox"/> After each interaction, record any new information you learn.</li><li><input type="checkbox"/> Unable to reach your client? Try reaching out another way—then, confirm their current phone number, email address, etc.</li><li><input type="checkbox"/> If a client asks you to stop contacting them, be sure to remove them from your list immediately.</li></ul>
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## WHAT'S INCLUDED:

- **The Clean D.E.S.K. Guide**  
*Step-by-step instructions for keeping your CRM organized.*



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### **Just remember the acronym D.E.S.K.**

#### **D**elete duplicate entries.

- Sort your list by name, and check for entries that look similar.
- Compare contact information to confirm whether these are duplicate entries or simply people with similar names.
- Contact the client(s) and confirm their current contact info.
- Condense all the current info into single entries.
- Delete the redundant entries from your list.

#### **E**ncourage follow-up.

- Create a field in your CRM or database for "Last Contact Date."
- Each time you're in touch with a client, update this field.
- Sort your list by "Last Contact Date," in reverse order, so you can see which clients are overdue for a call.
- Make note of any actions you need to take.
- Once you've completed a requested action, reach out again and let your client know.

#### **S**egment your list.

- Create three different tiers for your clients: A, B, and C.
- Make an A-list consisting of your valued clients, past and present.
- Make a B-List consisting of relevant leads, who have shown interest.
- Make a C-List of your broader field of prospects.
- In the notes section, keep track of where you stand with each client and move them up a tier, as the relationship grows.

#### **K**eep it current.

- Update your database to reflect all actions taken, including transactions, contact attempts, and referrals.
- Fill in all fields for each client. (If one isn't relevant, mark it "N/A.")
- After each interaction, record any new information you learn.
- Unable to reach your client? Try reaching out another way—then, confirm their current phone number, email address, etc.
- If a client asks you to stop contacting them, be sure to remove them from your list immediately.