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Preventing "Lawyer Meltdown" and Creating Productive, Profitable and Enjoyable Law Practices

Tips to Capture Contact Information for Follow Up

By Allison C. Shields, Esq.

Are you leaving money on the table by failing to follow up with clients, prospects and potential referral sources – or even worse, by losing their contact information before you have had an opportunity to follow up at all?

We've all heard the adage that people want to work with people they know, like and trust, and we also know that it takes time and effort to get to know someone. And yet somehow life (and work) seems to get in the way of the critical task of getting to know other people. You plan to stay in touch, but you forget. You have every intention of reaching out to former clients to see how they're doing and if there is anything else you can help them with, but you just never get around to it. You'd like to say that you spend time with clients 'off the clock' finding out about their business or industry and identifying new opportunities, but the truth is that it just doesn't happen for a variety of reasons.

I recommend that my clients create follow up systems and strategies for all kinds of activities and try to automate them using technology as much as possible. For example, I've worked with clients on their follow up strategies surrounding live seminars or presentations. Some of these strategies (most of which are scheduled and developed before the seminar even takes place) may include:

- Creating white papers or collecting articles related to the seminar topic for handouts
- Developing additional materials that can be mailed or emailed to participants after the seminar
- Setting a schedule for additional follow up steps using email, in person meetings, regular mail pieces and/or telephone calls

But regardless of how good your follow up systems are, sometimes you can get stopped right out of the gate when you miss the essential first step - ensuring the information about who you want to contact is readily available. That information needs to get into your contact database right away – *before* it gets lost in a pile of business cards or falls off your radar in your email Inbox.

Email

If you first receive contact information via email, enter the information into your email or contact database at the time you are reading or responding to the email. Even if you don't have time to fill in all of the contact details at first, get them into the database.

Most lawyers I know use Outlook. You can quickly add someone to Contacts by dragging and dropping their email into Contacts or by right clicking on their email address in the header and selecting "Add to Outlook Contacts." If you don't feel like filling in all of the fields, you can simply copy their email signature block (hopefully they have one) and paste it into the notes section of the contact, usually with a note about how you met them or what business they are in. Where appropriate, you can also categorize the contact. You can always go back and cut and paste information into the additional fields later.

But there is an even easier way – by using one of the Outlook add-ins that allows you to automatically put that information into your contacts without so many steps. Some examples include: Gwabbit® for Outlook, which identifies blocks of text in email and automatically "gwabs" it and creates contacts with one click (Gwabbit is available for Blackberry as well in both a free and paid version, but not for iPhone) or Copy2Contact, a similar program which can be used in Outlook and also on a Blackberry or iPhone.

Business Cards

If you receive contact information in the form of a business card, it has a good chance of getting lost or overlooked, particularly if you attend a lot of conferences, networking meetings or events. Those cards stack up fast! Enter the information into your contact database immediately when you return from a meeting or event with a contact's business card. (Even better, assign it to your assistant or someone else in the office, and create a designated space where you leave business cards to be entered daily).

Even if you don't have a dedicated card scanner, some scanners such as the popular ScanSnap S1500 will allow you to scan business cards and add them to your contact database.

If you have a smart phone, you can also download a card reader app that will allow you to take a photo of the business card with your smartphone and automatically upload the information to your contacts. Examples include the CamCard reader for Blackberry or Business Card Reader for Blackberry, the Business Card Reader for iPhone and WorldCard Mobile for iPhone.

Sync your smartphone to Outlook and you're good to go. Now you have no excuse to follow up – and since you've saved so much time on the process of entering contacts into Outlook, you can start developing a robust follow up system.

About the Author

Allison C. Shields, Esq., President of Legal Ease Consulting, Inc., is a former practicing attorney and law firm manager who helps law firms create more productive, profitable and enjoyable law practices by providing practice management and business development coaching and consulting. Contact her at Allison@LegalEaseConsulting.com, visit her website at www.LawyerMeltdown.com or her blog, www.LegalEaseConsulting.com.