15 BGT Contact Groups

- Contact Groups are an essential part of the system – especially the CRM.
- All target clients, actual clients, staff and suppliers and other stakeholders are all in the system database. (Clients and suppliers have an additional specific flag on their record that is used in the search function).
- Contact Groups are organised as a hierarchy:
    - Master Group (e.g. “Customers, “Staff name”)
    - Sub Group (e.g. “customer renewal Q1”, “customer renewal Q2”, and “18_email campaigns”, “18_direct mail”
    - Then there is the Contact Group Name. Within the Contact Group name are the names of the individuals or companies you wish to include.
- Create a new Contact Group in the **User Admin** section.

  Be careful to name groups: tip: include the year #.

- Whenever you want to target potential or actual clients, first create the contact group (if you need to) and then add individuals into the Contact Group.
- You can add target individuals directly from the CRM funnel interface, or from the “targeting” link above the CRM funnel, or when you are importing a file.
- Members of a Contact Group can be members of any number of Contact Groups. If they are in multiple, when you are in the CRM Sales Funnel, as you click on their record you will be able to see if they are in other Contact Groups.
- When you send an email campaign, it must be sent to a target Contact Group. (Optionally, you can send an email campaign through the CRM Funnel: click “the Function link” above the detailed funnel content listing).

See also: