



Categorizing CRM Contacts Part 3- Location, Location, Location

Another type of CRM category you may want to include is location. A location category can help to ensure that the right messages reach the right contacts.

For instance, some firms like to include categories for the firm offices that a particular contact works with most frequently. That way, when the office has an event, they can be sure to invite those Clients. This can also be useful when dealing with contacts who live in one location, but



work for a company that is in another. For instance, you may not want to invite the Yankees fans to the Braves game. Location categories can help to prevent that.

Additionally, some firms want to be able to add a location category to company contacts for each of the locations where they do business. For instance, a company may have their main office or headquarters in one state, but may have operations in several other states across the country. As a result, they may be interested in legal updates or alerts for multiple locations. If you are only able to search for the company's main location, you might miss the opportunity to provide information – and possibly legal services – to those Clients. But if you add a category for all of their regional locations, you can make sure they get targeted information for each state.

Other firms take location categorization to another level by utilizing software to convert zip codes into counties or regions. For instance, you might be having an event in Atlanta, but because the population is so spread out, you may also want to invite people in the surrounding cities or counties.

So sometimes CRM success sometimes really is all about location, location, location...