

Strategic Partner Program

Managing and Codifying Contacts

Sceris

Set up your Spreadsheet to Track Activities with Contacts

Start by preparing your spreadsheet to include the following columns, as a minimum. You will use this data for identifying industry and function segments for targeted campaigns, emailing, mailing and phone calls.

We recommend adding the following fields to your contacts master list, but format the worksheet to your preference, organizing the columns in a way that you consider most useful:

Column A: “Next Scheduled Date of Contact” (Use for DO NOT CONTACT if requested by connection) [Date Field]

Column B: “Last Contact Date” [Date Field]

Column C: “LinkedIn Profile URL” [Text Field]

Column D: From LinkedIn – “Last Name” [Text Field]

Column E: From LinkedIn – “First Name” [Text Field]

Column F: “Goes By” (Alternative First Name) [Text Field]

Column G: From LinkedIn – “Email” [Text Field]

Column H: From LinkedIn – “Company” (Company Name) [Text Field]

Column I: From LinkedIn – “Position” [Text Field]

Column J: From LinkedIn – “Date Connected” [Date Field]

Column K: “Home Street Address” (HIDE FIELD) [Text Field]

Column L: “Home City” (HIDE FIELD) [Text Field]

Column M: “Home State” (HIDE FIELD) [Text Field]

Column N: “Home ZIP” (HIDE FIELD) [Numeric Field]

Column O: “Business Street Address” (HIDE FIELD) [Text Field]

Column P: “Business City” (HIDE FIELD) [Text Field]

Column Q: “Business State” (HIDE FIELD) [Text Field]

Column R: “Business Zip” (HIDE FIELD) [Numeric Field]

Column S: “Phone Number (Cell)” [Numeric Field]

Column T: “Phone Number (Office)” [Numeric Field]

Column U: “Alternative Email Address” [Text Field]

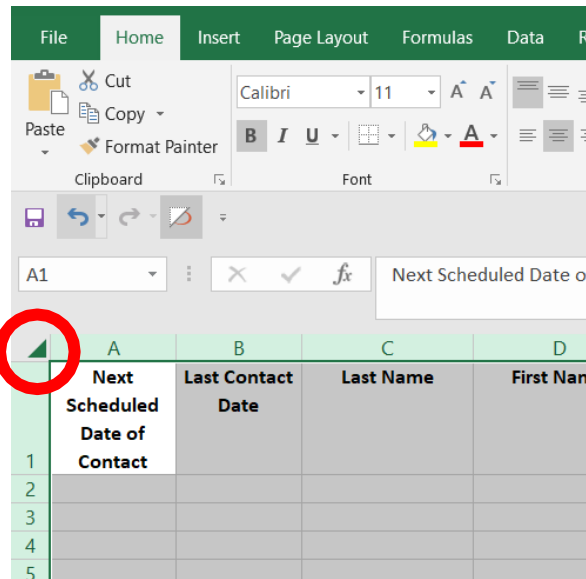
Column V: “Industry Code” (From Industry Codification Table) [Numeric Field]

Column W: “Function Code” (From Function Codification Table) [Numeric Field]

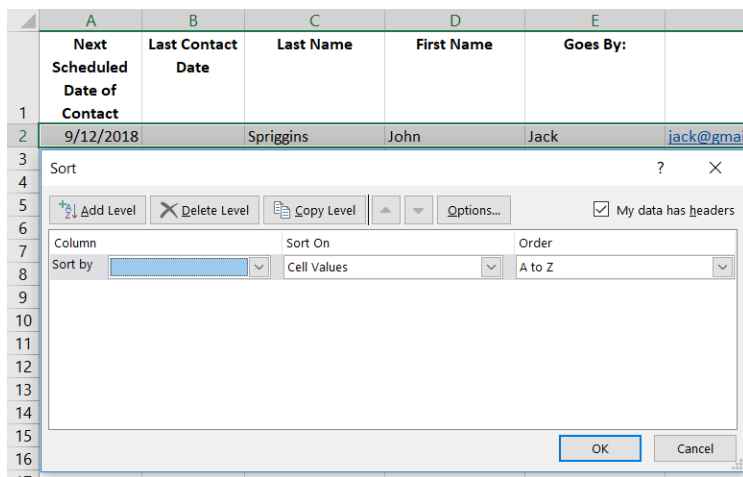
Column X: “Partner LOB Code” (From Partner Line of Business Table) [Numeric Field]

Column Y: “Last Message Sent” (Text or Text Code) [Text Field]

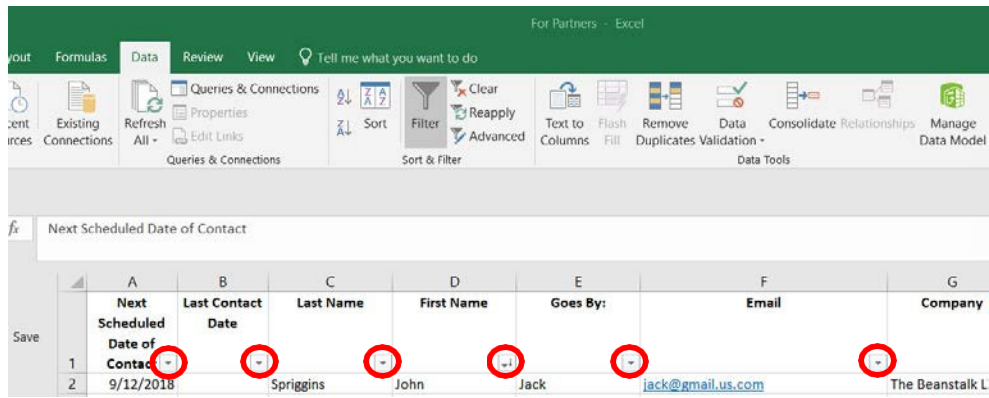
When sorting your list, always select all columns and rows by clicking the box in the top left (circled in red). This will select the entire workbook for sorting:



When sorting (Data – Sort), indicate that your worksheet has headers, and you can build your sorts without the concern of misaligning data (as long as you have sorted on all columns and rows at the same time – by selecting the entire worksheet as shown above).



Some consider using the Filter option as a better way to sort. If you want to apply filters, simply select the row that your headers are on (typically Row 1) and under the Data Menu Heading, click on Filter. It will insert an arrowhead into each of the labeled cells. Simply click on the arrowhead to select how you want to order the column and it will keep the data together for each row (unlike data-sorting, where if you don't select the worksheet, you are only sorting on the column).



CODIFYING YOUR CONTACTS

You may already have a spreadsheet of contacts, but if not, download your LinkedIn connections. Information on how to export 1st level LinkedIn connections into a spreadsheet can be found by browsing to <https://www.linkedin.com/help/linkedin/suggested/66844/exporting-connections-from-linkedin>.

BUSINESS	
1	Healthcare Other (NOL)
2	Hospital
3	Behavioral Health
4	Life Sciences
5	Laboratory
6	Group Practice
7	Home Health Services
8	Pharma
9	Nursing Homes
10	Ambulance
11	Banking
12	Communications
13	Construction
14	Distribution
15	Financial Services
16	Hospitality
17	Insurance
18	Manufacturing
19	Not for Profit
20	Professional Services
21	Retail
22	Transportation
23	Utility Company
24	Warehousing

FUNCTION	
1	Business Leadership (CEO, President, Executive Director, EVP)
2	Business Financial Leadership (CFO, SVP-Fin, VP-Fin, Corporate Controller, Controller)
3	Operations Leadership (COO, SVP Ops, VP Ops)
4	HR Leadership (SVP HR, VP HR, Director HR, Manager HR)
5	IT Leadership (CIO, CTO, SVP IS/IT, VP IS/IT)
6	Accounts Payable (Accounting Manager, AP Manager, AP Supervisor)
7	Invoicing and Accounts Receivable (Accounts Receivable, AR Manager, AR Supervisor, Patient Accounting Manager)
8	Payroll (Payroll Manager)
9	Risk Management
10	Materials Management (VP Materials Management, Director of Materials Management, Directory of Purchasing, Purchasing Manager)
11	HR Support (Internal Recruiter, Benefits Manager/Administrator)
12	IT Support (Applications Manager, Business Analyst, Project Manager)
13	Medical Records (HIM [Health Information Management], Medical Records Manager)
PARTNER CLASSIFICATION	
1	Partner - Individual - NOL
2	Partner - Company - NOL
3	Partner - Individual - Recruiter Generic
4	Partner - Individual - Recruiter IT
5	Partner - Individual - Recruiter Healthcare
6	Partner - Individual - Consultant
7	Partner - Individual - Insurance
8	Partner - Individual - Lead Generation
9	Partner - Individual - Entrepreneur
10	Partner - Individual - Networker
11	Partner - Individual - MLM
12	Partner - Company - Recruiter Generic
13	Partner - Company - Recruiter IT
14	Partner - Company - Recruiter Healthcare
15	Partner - Company - Consultant
16	Partner - Company - Insurance
17	Partner - Company - Lead Generation
18	Partner - Company - Entrepreneur/Small Business