Get Your List Together

By Robert Middleton

If you're going to send emails to past clients and connections, you gotta start with a list.

As King Richard III is rumored to have said, "A list, a list, my kingdom for a list."

Like a horse, a list will get you places. No list and you are cut off from contacting your prospective clients.

You really have two lists – Category 1 – Clients you have worked with before and those you haven't work with. This includes business connections of all kinds.

Your Past Clients list is a collection of current clients and past clients. And the other list, Category 2 – are close business associates who could connect you with prospective clients or in some cases might be prospective clients.

These are the people who know, like and trust you the most.

If you send them an email (especially if you inject a little humor), they are the ones most likely to get back to you the quickest.

You may have the names and contact information of these people in one place or they may be scattered to the winds. So put a little effort into organizing them.

Some people like spreadsheets, some use Google Docs. I tend to prefer Evernote. Others use a CRM such as Pipedrive or Hubspot.

The best list system is the list you use. I don't care if it's piles of yellow legal pads, put those names together in some way that is easy to access and ultimately track.

So for Category 1 Clients you may have from 10 to a few hundred names. Next you want to do a little prioritization.

A-Priority are those current or past clients that you think you have the biggest potential for earning more business from.

B-Priority are those past clients that you figure have some potential for new business.

C-Priority are those past clients that you are dismayed to realize you never want to work with again. So forget the ones on this list.

If C-Priority names take up the bulk of your list, you are in deep do-do. They are simply not likely to generate any new business any time soon.

OK, and then there are Category 2 – the business associates, contacts and friends that you know quite well that could possibly lead you to new clients. For instance, they may have been co-workers in a past company you worked for before striking out on your own.

Contacting the people in the different categories

Clients, A-Priority people are the ones you're going to contact first. They are low-hanging fruit. They are the ones most likely to hire you again, sooner, rather than later.

You'll send them personalized emails with the intention of getting conversations and then meetings.

Then you'll move on to Clients, B-Priority and so on.

We'll cover this in depth in the articles in the next section.

Next are your Category 2 business connections.

These are people with whom you have almost any kind of business connection or affiliation.

- People on your ezine list
- People who recently attended a talk or a webinar
- People who belong to the same business association or chamber of commerce you do
- People who are first and second-level connections in in LinkedIn
- People who are on your social media friends list

For people in this category, you'll send a somewhat different, and standardized email. That is, you may send pretty much exactly the same email to everyone in this category, depending on the source.

I'll cover this in depth in the next section.

Next are Category 3 Prospects

These indeed may be very good prospective clients. But you are complete strangers.

Sometimes the best thing to do is to move Category 3 prospects into Category 2.

For instance, if you join a professional group or chamber of commerce, they are now instantly in Category 2. Cool huh? Or once strangers attend a talk they move to Category 2.

But even if they are complete and total strangers, you can still assemble a list of them. For instance, these may be LinkedIn Connections.

To Summarize

Focus on your Category 1, A-Priority and B-Priority people first for making personalized contacts.

When you've run out of them, you want to start to put together your Category 2 List.

And Category 3 is somewhere down the line.

OK, now proceed to the next section of articles on how to set up meetings with your connections.

Cheers, Robert