

# WHERE TO FIND THE DATABASE FOR YOUR CUSTOMER MAILING LIST

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## WHERE TO FIND THE DATABASE FOR YOUR CUSTOMER MAILING LIST

### IN-HOUSE SOURCES

Before you think about a list of prospective customer names, you should first create a database for current customers' names and develop a mailing list. (Remember, your current customers are most likely to respond to your future offers.)

Finding the data to include on the customer portion of your mailing list can be fairly straightforward if you have your own in-house records. But even then you may have to develop more sources to obtain additional data about your customers.

Here are some of the in-house records you can use to develop your customer database:

1. **Sales Receipts/Invoices/Order Forms:** These documents can give you the following information: date of last purchase, dates of all purchases over a period of time, and amount of money spent with you. You may also be able to determine what products/services were ordered from you. When using invoices to compile your customer list, be aware that in businesses they may be addressed to the Accounting Department rather than the individual/title most likely to purchase from you.

Especially if your customers are businesses, they may use two addresses. One is the "Ship-to" address, where ordered items are sent. The other is the "Bill-to" or "Mail-to" address, where invoices and catalogs are sent. Make sure you're using the correct address every time you correspond with the customer.

2. **Shipping Records:** Shipping records can be an important source of customer names, particularly if your product is sold through a dealer or distributor, and you don't have direct access to customer order forms. Again, be aware that some customers may have different billing and shipping addresses.

3. **Membership Lists:** Every organization is sure to have a list of its members. If your organization has several membership categories, this information should be associated with the member name when you add it to your list.

4. **Registration Forms:** If your organization does not maintain a membership list, you may still be able to identify your customers from the registration forms and sign in sheets you use at your events. One approach to collecting names is to ask attendees to add their names to your mailing list.

5. **Contest Entries:** The entry forms for a sweepstakes, contest, or raffle can be used effectively to get the names of your customer. This approach might be most useful if your organization lacks customer records because you provide your product or service free of charge.

### OTHER SOURCES

Sometimes, your own records don't hold enough information about your customers or members. You may have to rely on other sources to capture additional database information:

1. Warranty Cards: Warranty cards included in packages of merchandise can be an effective way to gather information about customers. On the card, you can request that the customer complete the demographic information and return it when he/she registers the product.
2. Surveys: Phone or mail surveys are another way to gather (and later update) information on your customer database.

Phone surveys can be used in a number of different ways to collect database information. For example, you can call customers and administer full questionnaires to gather complete information about them. This can be a very costly way to collect data - especially for a large number of customer. Mail surveys (which will be discussed later) may be a better technique for this type of database information collection.

Phone surveys are useful if you are updating or adding single fields to your database. You may avoid the phone cost altogether by asking a few short questions each time a customer calls in - to place an order, get a price quote, etc.

Mail questionnaires can reach a larger number of customer at a lower cost than phone surveys. Mail questionnaires can be sent individually to customers. However, to save postage costs, surveys can also be inserted in mailings, included in packages of merchandise, or printed on any other correspondence with customers, such as invoices.

If you have a store or office, you can also conduct surveys by having customers fill out questionnaire cards when they visit.

Other sources you can use to build your list include:

- \* point of purchase questionnaires.
- \* membership application forms.
- \* Questions on purchase orders, statements, invoices.

At the end of this report are examples of a warranty card and a survey used to collect database information.

Your customer names are the core of your mailing list. This report has described some sources for collecting database information on current customers. You should consider every contact with a customer a potential source for collecting such information. After you collect this information, you need ways to initially get it into your database and then to regularly make sure it's current and accurate. (Out-of-date, inaccurate mailing lists waste money and reduce results.) Please see Report 3506 for some suggestions.