ID Status Field Suggestions by Tony Holowitz

If you have a database filled with contacts and you cannot find them quickly, it almost defeats the purpose of using Act.

The easiest way to keep track of your contacts in Act is via the ID Status field. I have always felt it is the most important field in Act and it is imperative that you keep it simple and easy to use. Through my years of working with Act I have found that there are **nine statuses** that will fit every single contact in your database.

Another aspect of working with Act data is to make data entry easy. Every one of my suggested ID statuses will begin with a **different first letter** allowing you to simply press the first letter of that status to quickly enter it into the ID Status field. Because the field is so important, you can set Act to require this field (in other words, if you enter a new contact you can't navigate away from that contact until you give it an ID Status).

Here are my suggested ID Statuses:

1. **New Lead**: If a prospect or client needs a product or service, I would immediately change their ID status to "new lead". Every Monday you will review all of your new leads. I personally tell people that if for some reason they do not hear from me I will get back to them no later than next Monday. By reviewing my new leads every Monday I know they will never slip through the cracks. In addition, I've set a level of expectation for my new lead as to when they should expect to hear back from me at the latest.

2. **Prospect**: any contact who has never bought from me that is a potential client.

3. **Vendor**: anyone you spend money with in the course of running your business. For example, your Internet service provider, wireless, office supplies, etc.

4. **Tony (your first name)**: anything that is personal such as friends, family, doctors, accountants, I put under Tony. Use your name or variation of your name for anything that is personal.

5. **Employee**: I use this in two ways. First, any employee at your company can be marked as an employee. Second, if you work with a business and you have some of their employees in your database that are not decision-makers,

mark them as employee.

6. **Delete**: if you have a contact that you want to delete, put delete in the ID Status. On many occasions I have seen clients that have accidentally deleted contacts. I want to make sure that you or your staff do not do this by mistake. Therefore, put delete in the ID Status and periodically delete these contacts **only after making a backup of your data**. The safety of your Act data is paramount.

7. **Key Clients**: any client that is new, recent or in the top 20% of your revenue is a Key Client. You will review your key clients at a minimum monthly; on the first Monday of the month.

8. **Secondary Clients**: a client worthy of review quarterly. For example, a client that you believe has potential repeat business and needs to be touched by phone or email at a minimum every quarter.

9. **Inactive Client**: a client that is a step above a prospect. You might never do business with them ever again.

The beauty of this approach is that it is very simple. Based on my years of experience I believe every single contact in your Act database can fall into one of these nine categories.

So how do you keep track of all of these contacts? Easy: groups. Make sure you take a look at my groups tutorials to learn how to simply find these contacts as needed.