



## **Contact Management within mBLAST:**

**Pros and Cons of  
Different Approaches**

Data maintenance is a big issue for many companies, and keeping contact lists up to date might be the biggest headache of them all. With job switches, layoffs and company mergers on the rise, data maintenance is an ongoing process that takes up a lot of your staff's valuable time.

mBLAST offers a unique approach to data maintenance. Every time a user logs into mBLAST is an opportunity for you to receive updated information and find out job moves, title, address, and phone changes, and more. Companies using mBLAST that opt into the mBLAST community can cleanse their databases, not just the first time of use, but also on an ongoing basis.

While this approach has its benefits, there are some perceived detriments that we get asked about all the time. Top of the list is the perception that opting into this public database of information – in particular contacts with one's own private contacts – will cede competitive advantage to others. "This is our private list of names that we worked for years to compile – it's our crown jewel," we often hear from analysts firms, publishers, event organizers and others who make their business working with specific contacts to yield distinct results.

mBLAST has analyzed these issues as they have come up, and this paper sheds some light on an actual comparison of direct competitors who shared a similar concern surrounding contact information. As the reader will see, today's Internet Age – with ready access to search, filtering, communities of interest and social networks – is enabling a whole new approach to contact research and contact management that is changing the way companies obtain and update their information.

## Setting the stage

Company A is a long-time mBLAST customer using one of mBLAST's workflow modules to gather information for its publication. Company B is a new customer and a competitor to A, beginning to put together its own workflows and contact lists within mBLAST in the same topic area as Company A. When done, the output of Companies A and B will directly compete on the Internet for readers.

Company A thinks that Company B will be constructing workflows based on A's contacts in the mBLAST system, and does not want to do anything to give its competitor easy entry into the same area of editorial coverage. If Company B has access to Company A's contacts, it will accelerate B's market entry, Company A believes.

So first, let's establish a few baseline statements about mBLAST and its privacy policies regarding data. The mBLAST system consists of layered, shared databases across 19 types of marketing content –

articles, press releases, products, analyst reports, companies, etc. This system has both public and private data within it.

First, there is a central public database which encompasses all public information across all content types and workflows. When users update their information (profile, contact info, etc.) in any “public” part of the mBLAST system, it updates for all of the buyer’s guides, awards programs, directories, etc., as well as other modules used by users, connected to this main public database. This creates a community of marketers, sharing constantly updated public information with Influencers, so that the information reported by Influencers is essentially never outdated or wrong.

In addition to this, each workflow – awards program, buyer’s guide, directory, or media credentialing process – can have its own “private” database based on a workflow owner’s preference or requirement to keep that information out of the public databases. This database can encompass contacts, product info, survey data, etc., and does not feed into the overall public community database. For example, in private processes, if a user updates his contact information in a private workflow, that update does not flow through to the main mBLAST database or any other companies’ workflow processes. However, this “private” nature is a two-way street; private databases also do not receive updates and information from the main public mBLAST database either. If a user participates in several processes within mBLAST, and their contact information is updated in a public process, it will not flow through to other processes that have been marked private.

The mBLAST system has multiple settings that enable workflow administrators to keep some information private and some public – allowing them to optimize their use of all databases for their specific instance and editorial policies.

For contact information, mBLAST has three levels of privacy that administrators of workflows can set, depending on what he/she wants to accomplish with the workflow:

- **Always Private:** The registrants for this process will create a private profile that is visible by the workflow administrator only. The users are not prompted to opt into the larger mBLAST community.
- **Initially Private:** The registrants for this process will create a private profile. The user is prompted whether they wish to opt into the larger mBLAST community. Those that do will have public profiles in mBLAST.
- **Always Public:** All registrants for this process will create a public profile in the mBLAST community and will not be shown any option for opting out of that community.

In short, Always Private and Always Public are just that. When setting up their preferences for the workflow, the workflow administrator chooses whether or not the workflow's contact paradigm will be public or private. The public setting allows for a free flow of information between the workflow and the public database, whereas the private setting does not. The Initially Private setting allows workflow administrators to let their users decide whether to opt in to the public database and information. Historically, when the Initially Private setting is used, more than 80 percent of end users opt into mBLAST so they can keep their information current across different organizations' workflows. They appreciate that, when they log into one mBLAST process, their contact information is saved to speed them through other processes. The above applies to all types of content within mBLAST except company profiles. Company profile data – the name of a company and its address – is always considered public information and is always linked as all our customers have indicated this is their desire; the constant mergers, acquisitions, bankruptcies, etc. in the corporate marketplace make it almost a necessity to keep opted into the public databases to retain good data integrity.

Let's review these scenarios in the context of Company A. Company A sets itself up in the mBLAST system as wanting its contacts to remain private. In this scenario, only users with access to Company A's workflows (i.e., employees, workflow administrators, etc.) can see these contacts. Accordingly, someone from another company using mBLAST's Search capabilities or working within the Workflow module will not be able to see or find the contacts that Company A has protected.<sup>1</sup>

It's important to keep in mind, however, that many of the contacts Company A considers to be "their contacts" interface with mBLAST in the course of their everyday marketing tasks; therefore, it should be expected that a good portion of the names will also be present in the mBLAST system, particularly as time passes and they are invited by other Companies to take part in their workflows. With the emergence of these contacts in the public domain of mBLAST, and their ongoing maintenance and use by other companies, there will be changes and updates made to their contact information. Assuming Company A has elected to keep their contacts private, the updated information will not flow through into the private records of the contacts in Company A's database within mBLAST. At the same time, any contact information updated or changes by users taking part in Company A's workflows will not flow into public domain of the mBLAST network. The contact records are fully detached. With the privatization of contacts, there is also the option to export the contacts into the firm's sales database. This will only further distance the firm from changes and updates to the contacts.

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<sup>1</sup> Of course, if there is another public record for this same contact, users will be able to find this public record – totally unrelated to the private record – in the system.

An important note: Whether a company's contacts are private or not, no one other than an individual workflow's administrator can access collected groupings of data (i.e., perform such functions as allowing Company K to "view all contacts, companies, or products, etc. from Company A's guide) from a workflow database in mBLAST for their own use. No one can see the collected information within someone else's workflows within mBLAST.

As mentioned above, company data is different from other types of data in the system. Privatization of the contacts does not mean privatization of corporate data. The names, addresses, logos, etc., of the companies participating in Company A's workflows will remain in the public domain, just as they did before Company A elected to make its contacts private. Any changes made by a workflow-participating company to its company profile will flow into Company A's Companies page and into the public databases. Note: As part of the response process in the mBLAST workflows, a participating company has the option to create a custom profile for Company A, say an association profile to brag that it was a founding member of the group. This custom profile is also public but in a more limited fashion. It is available for Company A to apply to other workflows in the system, but it will not affect their main public company profile within mBLAST and it will not be viewable by users outside of Company A using mBLAST Search and other means.

Product data can also optionally be public or private. Within the Preferences section of a workflow, workflow Administrators can choose either to sync or not sync to the central mBLAST product databases. If the workflows are not synched, then any changes or updates made by Company A will not flow into the main database and changes or updates made in the main public database will not flow into Company A's workflows.

In summary, mBLAST is flexible in offering private and public options. The core question is what we call, "The White Pages Issue": If contacts are readily available in a system – just like they are in the White Pages of the phone book – does that in and of itself mean someone is at a competitive advantage or disadvantage? Said another way, how readily can someone find contacts for public relations and other marketing professionals, as well as media, 'out on the Web' and what's the quality of that data vs. the data companies may be closely guarding as sacred? Read on.

## **The Social Networking Environment**

One of the predominant ways that people are connecting with each other, both in business and in their personal lives, are through social networking services. These websites have grown significantly and become extremely useful as more people join. Networking sites, such as Plaxo ([www.plaxo.com](http://www.plaxo.com)), Jigsaw

(www.jigsaw.com), ZoomInfo (www.zoominfo.com) and LinkedIn (www.linkedin.com), allow users to find other people in the business world. A user can search by name, company, job title, division, and even by recommendations from peers in the company (which for this analysis we did not try). Depending on what the user has searched for, the results will be different. If searching by name, for example, the sites usually display the results with a company name or position attached to the search result, so the user has a better idea as to which result is the most useful to them. While the specific products covered by a person (e.g., Sam Smith is the product manager for 'WAN routers') are not often mentioned in social networking text, keywords can usually get you into the right area of a company where you can ping a person online to get a reference into the right person.

Depending on the site, each user's profile has a wealth of information, including educational information, past employers and positions, geographic location, and, of course, current employer and position held. Once a user finds another user, they can add them to their own network, and request access to their contact information. The user can also send the person they located a message through the networking site without adding them to their network.

Social networking sites have grown fast and are rapidly becoming a core part of business processes. Moreover, these sites are defining a person's contact domain, enabling them to maintain constant contact to those people who can help them achieve their everyday business goals; as a distant contact changes jobs or titles, this information is automatically changed in the user's database and usually the user is alerted that this change has occurred. mBLAST, in essence, is a social network for all marketing information, in the same fashion.

## **A Competitive Case Study**

So with this as background, we can now test Company A's concern that Company B would be advantaged if its contact information were public in the mBLAST system. Recall that Company A's contacts are private and Company B has chosen to load in their own databases, but have made their workflow contact information public.

To make this an apples-to-apples comparison, we compared one of Company A's Buyer's Guides to one of Company B's Buyer's Guides for the same product set. Company A had 174 contacts in its listing; Company B had 56 contacts listed in its listing.

So we went 'looking' for these contacts as if we did not know who they were – with the goal of finding out how easy it would be to find contacts for this Buyer's Guide topic, if we did not already have a list of

contacts to work with. We started merely with a listing of companies we wanted to take part in each Buyer's Guide. A standard mode of looking included:

- Searching websites of the companies
- Searching old press releases of the companies
- Looking on social networking sites for information

Assuming that each contact in each of the workflows of Company A and Company B were necessary, the question to answer was whether standard research techniques of public websites and databases would have yielded anywhere close to the same volume and accuracy of contact data.

Here's the high-level summary of the data (a discussion follows):

### **Company A**

*We started with:*

- 174 contacts are presently in Company A's private Buyer's Guide

*We reduced this somewhat due to circumstances of the data:*

- 2 contacts are mBLAST employees providing support
- 1 contact name is listed as "Press Contact" and only has a general contact email address (e.g., media@company.com)
- 3 contacts belonged to companies who have been acquired by other companies
- Of those 3 contacts, 2 of them were the same person who worked for a PR firm. This contact is also the contact for another company in the guide
- 1 contact was identified with a company that had no website entered in its mBLAST profile and could not be found using an Internet search.
- 1 contact is not identified with a company

*This left for us to find:*

- 166 contacts are presently in Company A's private Buyer's Guide

*Here's what we found:*

- 77 contacts could be found somewhere on their company's website (contacts page, newsroom, recent press releases, etc.)
- 13 contacts were connected with companies that required filling out a form to get in contact with. Of these 13 contacts, only 4 could not be found on a networking website such as Plaxo, LinkedIn, ZoomInfo or Jigsaw.
- This leaves 76 of the contacts not found on a company page, or contactable through the website.

- Of these 76 contacts, only 15 could not be found on a social networking website.
- Of these 15, only 2 were active in filling out the actual Buyer's Guide data – the remaining 13 had not responded to the Guide Administrator's requests to take part.

## **Company B**

*We started with:*

- 56 contacts are presently in the Company B's Buyer's Guide

*We reduced this somewhat due to circumstances of the data:*

- 1 contact is an employee of Company B
- 2 contacts are mBLAST employees providing support
- 1 contact belonged to a company who has been acquired by another company

*This left for us to find:*

- 52 contacts are presently in the Company B's Buyer's Guide

*Here's what we found:*

- 25 contacts could be found somewhere on their company's website (contacts page, newsroom, recent press releases, etc.)
- 2 contacts were connected with companies that required filling out a form to get in contact with. Both of these contacts could be found on a networking website such as Plaxo, LinkedIn, ZoomInfo or Jigsaw.
- This leaves 25 contacts that could not be found on a company page
  - Of these 25 contacts, only 5 could not be found on a networking website.
  - Of these 5, none were active in filling out the actual Buyer's Guide data – they had not responded to the Guide Administrator's requests to take part.

So just from the point of view of findability, almost all of the contacts were readily apparent on their websites or in social networking search engines.

Now, let's evaluate the issue of competitive advantage. Does having these contacts in the system as public contacts disadvantage Company A? Well that would only happen if Company B would find and use Company A's contacts in mBLAST. So let's look at the overlap between the two firms' databases used to research the same topic in the same industry for similar editorial output.

## **Overlap**

*How many are in common?*

- 21 contacts appear in both the Company A and Company B contact list for this Buyer's Guide topic

- Of the 174 Company A contacts, 21 were in Company B's list
- Of the 56 Company B contacts, 21 were in Company A's list

*How readily were these 21 contacts found on the Internet?*

- 13 contacts could be found on the corresponding company's website; 8 could not be found on the company website
- Of these remaining 8, only one could not be found on a networking website
  - This one person was not active in filling out the actual Buyer's Guide data – they had not responded to the Guide Administrator's requests to take part.

Looking at the data, it is clear to see that about half of the contacts could be found right on their company's websites in one way or the other. Sometimes this took a little digging (i.e., looking at recent press releases), but it is very accessible information. Of the other half, a small portion required filling out a form to get in contact with someone at the company. Of those contacts, most of the ones from Company A's guide could be found on networking websites, and both (2) of the contacts in Company B's guide could be found on networking websites. Of the contacts that could not be found directly on a company's website, a majority of them could be found on networking websites. Those who could not be found anywhere were no help in actually doing the work in the guides anyway, so they don't matter – those that did the work were publicly discoverable.

It took an unskilled intern two hours to do the contact analysis for this white paper, dispelling the myth that this takes weeks of effort to find contacts at companies.

## **Conclusions – The Trade-Off**

Our premise, drawn from many different interactions with the marketers and influencers we deal with, is that while 10 years ago you could say that these contact lists were unique items and something to be guarded closely, in a world of Plaxo, LinkedIn, ZoomInfo, Jigsaw, and other contact programs, as well as databases like Cision, Vocus, and other media info sources, it's becoming easier and easier to 1) find info outright, and 2) if not found outright, get some contact(s) within the organization(s) where you can make an entry point to ultimately find who you need to find. The speed of finding a contact close to where you want to get to within an organization is swift, and honing in further often happens quite quickly with the majority of communications. Further, we'd argue that with the fast moving pace of interactions required between influencers and marketers, having the right name of a person is not enough – it's having the right contact information for that contact as well.

Herein lies the trade-off of public versus private data. No doubt, being able to search for a contact in mBLAST takes a second or two, while to research that contact on the Web takes some amount of time. It's clearly faster when the contact is a public contact in mBLAST. But keeping a company's contacts private does not really keep the contact out of mBLAST – they are likely to enter in via some other process, and ultimately we contend that anyone with a market-facing job will find a way into mBLAST. So while loading your contacts into the public database of mBLAST will speed competitors' ability to load contacts, the above analysis shows that they too have their own contacts, and the ones you share are pretty publicly accessible. Company B, by merely loading their own contact databases into mBLAST, was able to get started using on the same topic very quickly. In their eyes, they did not even need Company A's database.

So the cost of not taking advantage of public contact data is clear. Contacts get really stale, really fast. The majority of contacts in the mBLAST databases update their contact information each year, and mBLAST is working on ways to better “prompt” users to keep their information current. The collective power of repeated opportunities to update information will always exceed the sole power of one workflow's options.

In the end, it's your call and we support you either way. We just want to make sure you have as many facts and opinions as we can get you, in order to make an informed decision that's right for your circumstance.

mBLAST's approach to maintaining contact information balances the benefits of public participation in our contacts databases with the sensitive issues surrounding proprietary data. You can opt in or opt out – mBLAST loves to have you participate either way. Our recommendation is to opt in, so you can stay current on the info you need to do your job as quickly as possible. We would argue that publications, analyst firms, and others don't differentiate themselves on their ability to maintain contacts, but on the content created from those contacts.