

Contact management:

Common challenges and how to overcome them

Table of contents

CHALLENGE 1:

Centralizing the most up-to-date contact information 3

CHALLENGE 2:

Creating and updating common contacts should be easy and benefit everyone 4

CHALLENGE 3:

Access employees directories from everywhere 5

CHALLENGE 4:

Being compliant when handling personal information 6

How can Shared Contacts for Gmail® help? 7

Introduction

Contact management means storing, organizing, securing, and tracking contact information about your prospects and customers, sales leads, vendors, partners, stakeholders, employees, – the list goes on – and making them available for all the members of your organization.

Contact management concerns all businesses, organizations and even individuals who need, for some reason or another, to keep track and use of a large or ever-growing number of contacts.

But what kind of contact management related challenges are there, and how can you solve them effectively?

In this guide, we will go through some of the most common challenges we have run into, and tell you how a comprehensive contact management solution like Shared Contacts for Gmail® can help you tackle them.

CHALLENGE 1:

Centralizing the most up-to-date contact information

Organizations store a wealth of information about their contacts, but this data is fragmented among users, devices and applications. Not having the full picture of your contacts results in low efficiency and legal risks.



⚠️ Risks and consequences

01

Time wasted to ask around for contacts information or maintain duplicate contacts

02

Low performance: The lack of a 360 view of your contacts affects your efficiency and customer relationships

03

Compliance issues: It's hard to respond to a GDPR erasure request when personal data is scattered account account and devices

💡 Actionable solution

Make sure that all the contact information you collect are synchronized with a single source of trust:

- Synchronize your company directory, CRMs, mobile devices, contact apps, emails etc. with a cross-platform contact manager
- Use a contact manager that allows you to organize and tag your contacts in a way they will make them easy to find
- Define who can access which contacts
- Clean your contact databases in a way that only a single occurrence exists for each contact. This is a must for compliance



CHALLENGE 2:

Creating and updating common contacts should be easy and benefit everyone

When users collect new contact information (e.g. when meeting a new lead, receiving an email from a new contact, or adding it in a third-party system like a CRM,) this information is not always saved or automatically made available in everyone's contact books on all their devices and apps.



⚠ Risks and consequences

01

Time wasted to update everyone whenever some new contact info is added

02

Information lost: As people don't always have their CRM open and available at all times, sometimes they just don't keep the contact in their emails, or worse, in their mind or in their pockets

03

Information silos: Not everyone has access to the same information at the same time.

💡 Actionable solution

Updating and sharing contacts should be possible anywhere: in Gmail, on your phone, in your CRM, anywhere on Google Workspace, in any contact manager, and so on. You can do it by:

- Creating shared contact lists
- Defining who can add or edit contacts
- Synchronizing these lists with all your systems, e.g. your company directory, Google Contacts, mobile phones, IP phones etc. with 2-way synchronization
- Install add-ons and extensions that automatically update your centralized contact database, wherever you are



With Shared Contacts for Gmail, organizations can centralize contacts lists, define access permissions and make them accessible from all software and devices.

CHALLENGE 3:

Access employees directories from everywhere

Organizations using Google Workspace have a hard time keeping up with the phone numbers and emails of all employees, making sure that everyone can call, WhatsApp or email a colleague whenever, or finding who is occupying what position in the company.

This becomes a mission impossible when your organization deals with multiple Google Workspace domains. Also, it is a challenge to hide confidential contact details from non-authorized users (like separating home and work phones.)



⚠ Risks and consequences

01

Communication broken: wrong or unknown phones, caller IDs or email addresses leads to confusion.

02

Time wasted: Searching and asking for colleagues' contact details takes time

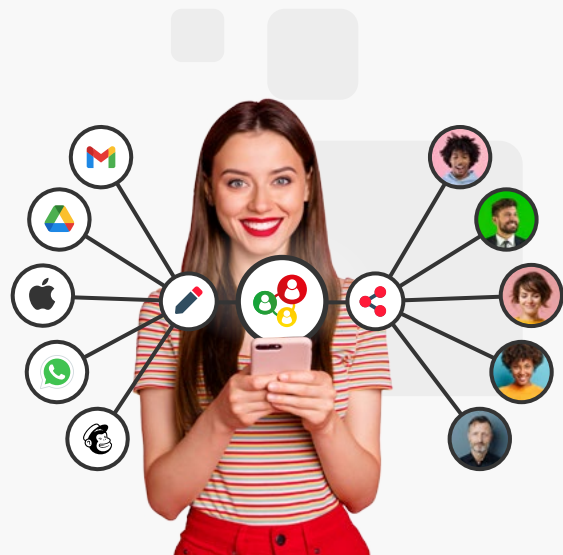
03

Obsolete information: Not having an easy way to update every employee contact information leads to outdated contact data.

💡 Actionable solution

Organizations ought to set up a system to:

- Synchronize your directory or directories with a single contact manager
- Make sure this manager synchronizes with all your systems, Google Contacts, mobile phones, IP phones, email clients etc.
- Share the right contact details with the appropriate users
- Decide who in the organization can update the contact details of the employees. It's a good practice to allow employees to update their company profile directly



CHALLENGE 4:

Being compliant when handling personal information

Following all kinds of different regulations might feel overwhelming – but it can be easy and stress-free with the proper tools.



⚠️ Risks and consequences

What might happen if you don't handle contact management properly:

01

You don't know who sees and can modify which contacts in your organization

02

You don't know who edited or deleted information

03

When a contact is shared, everyone can see all the details – even private information they shouldn't see

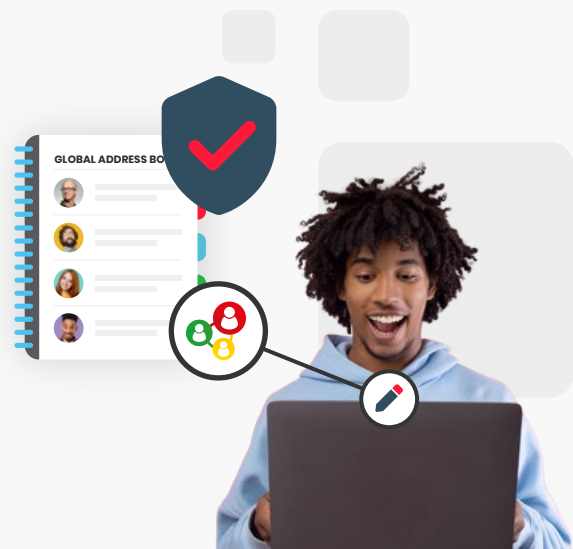
04

If someone submits a request to remove their information, you can't do it easily when the information is scattered all over the place

💡 Actionable solution

You can solve this and be GDPR compliant by:

- Checking you have cleaned outdated information and removed duplicates from your systems (the contact information only exists once and is synchronized across tools)
- Assigning permissions to users and defining who can add or edit contacts, and have access to certain information





How can Shared Contacts for Gmail® help?

Shared Contacts for Gmail® is a contact management system that allows you and your team members to share, access, comment on, and update centralized contacts from everywhere.

You can try it for free and see how your organization can have a clean, synchronized and well organized contact base, accessible by everyone on your team.

We can help you understand how you can make the most of your contacts, clean and share your contacts properly, and ensure your users adopt the best practices in the industry.

We can help you tackle all the common problems outlined in this guide. How cool is that? But what's even cooler: You can try Shared Contacts for Gmail® for free.

[Get your free trial today](#)