

MAKING THE DECISION ABOUT CONTACT-CENTRIC VS. COMPANY-CENTRIC USE OF GOLDMINE

GoldMine can be set up to operate in two very different ways. There is no “right or wrong” about this; but one of these ways is likely to be much better for your company than the other. The purpose of this paper is to help you determine which is better for you; and to explore how you may want to use certain GoldMine features, based on the choice you make.

CONTACT-CENTRIC means that GoldMine’s **Main Contact record** is about a Contact...that is, a **person**. The Main Contact record includes the Company name, Contact name, address, E-mail and Web Site addresses, Key fields, User-Defined fields (UDFs), and certain other fields, like Department and Merge Codes. In the Contact-centric model, most of this Main Contact info should relate to the Contact; that is, to **one person**¹.

COMPANY-CENTRIC means that the subject of the Main Contact information is **NOT** a person, but rather a Company (or perhaps, a particular Company office). In this model, the Contacts (people) are entered under GoldMine’s Contacts tab. Because User-Defined fields all relate to the Main Contact record; and because the Contacts (people) involved are **NOT** part of the Main Contact record, but instead are attached to it; **UDFs should relate to the Company in the Company-centric model**, and not to Contacts².

Throughout this document I’ll use the term “**Org Charts**”. For those of you using the new Premium version of GoldMine, you can substitute the term “**Relationships**” for Org Charts. They have essentially identical functionality.

Which way to go? As you might imagine, the choice of modeling GoldMine’s Main Contact record around a Contact (person) or around a Company is a very fundamental one. It deeply affects the kind of data that you can store in GoldMine. On the one hand, it’s very handy that GoldMine has this dual personality; but on the other, you are required to clearly define GoldMine’s mission. If you try to go in both directions at once, you can quickly find yourself in confusion, and with data that is questionable as to its real meaning.

While it’s tempting to say “choose one model or the other, and then be absolutely consistent”, that approach often just doesn’t work in the real world (hence my footnotes). Instead, what we’ll do here is to determine where consistency really is important; and also look at some exceptions that can be useful to us.

For most GoldMine-using Companies, the decision about whether or not to go Contact-centric or Company-centric really boils down to the answer to the following question: are you marketing to (or serving) **people**, or **companies**? **The depth of your contact with people** at the various companies that you target and serve will determine how you answer that question. If you feel the need to keep up with personal information, like birthdays, kids’ names, favorite teams, hobbies, association memberships, etc., then your real targets are people. But if you have few Contacts at most companies; and if the names of those Contacts tend to change as people change positions within a company; then a Company-centric solution may be your best choice. If you just aren’t sure, spend some time with a GoldMine pro discussing the question; it will be well worth it.

Using the Contact-centric model – Perhaps because GoldMine was originally called a “contact manager” program, the vast majority of GoldMine databases are set up using the Contact-centric model. Here are the major characteristics of that model:

- ❖ Typically, each Contact at a Company will have his or her own Main Contact record. All User-Defined fields in the Contact’s record will relate to the person, **not the Company**. All Detail records, History, Calendar entries, etc. will also relate to the person.
- ❖ For the various Contacts at a Company (or location), the Company field should have the same value in each record. These Contacts can be connected via GoldMine’s Org Charts, either by making the Charts manually, or by having them made by an automation program like GoldBox. The **Activation** feature of GoldMine’s Org Charts enables you to select sections of the Org Chart and treat them like Groups, say, for a quick E-mail mini-blast. Activating sections of an Org Chart can also be useful when running reports.

However, there is another feature of Org Charts that I strongly recommend that you use sparingly, if at all. That feature is **Replication**. The idea behind Replication is that you can designate certain fields (like

¹ There is one exception to this rule, which I’ll explain later.

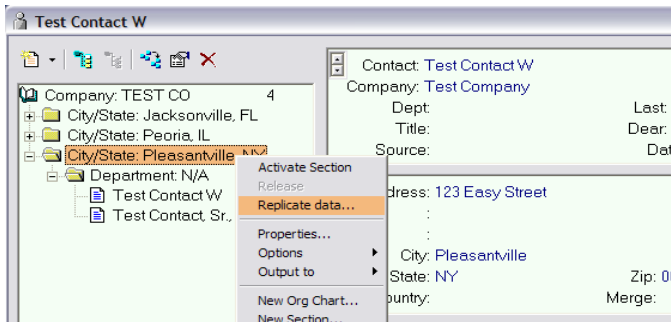
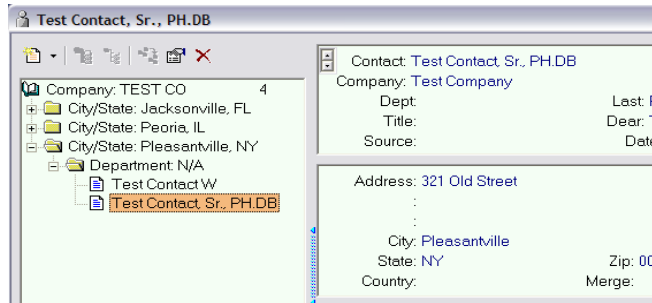
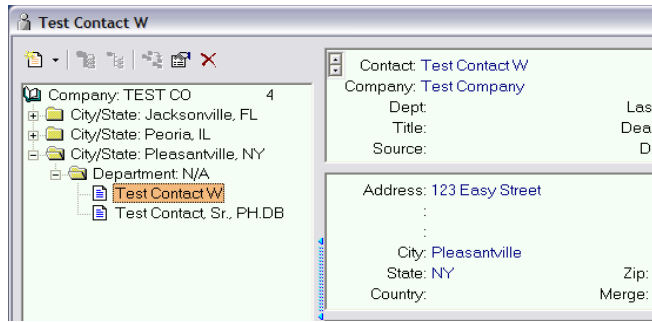
² Again, there are some possible variations that I’ll discuss later.

the Address and City/State/Zip fields) within the Main Contact to be special “Company fields”, even though you are using the Contact-centric model. Whenever a User changes data into one of these special fields, he or she can then use the Replication feature to duplicate that data to all the other records in the Org Chart section the User has highlighted. Here’s an example of how Replication works:

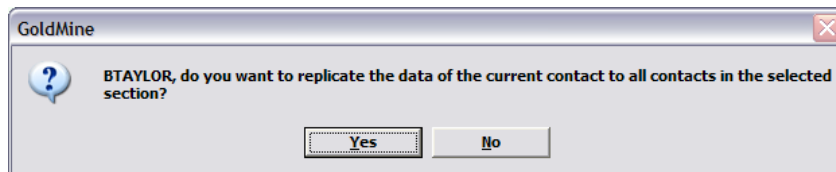
This Org Chart happens to have been created by GoldBox, but it could have been created by GoldMine (except that GoldMine doesn’t give you a count of the records in the Org Chart, as shown here).

Suppose one of the locations of a multi-location Company has physically moved, and you want to change the Address fields in all the records for the old location. In this example, that would be all records in Pleasantville, NY.

One way to quickly update the Address values would be to use Replication. As shown below, you would:



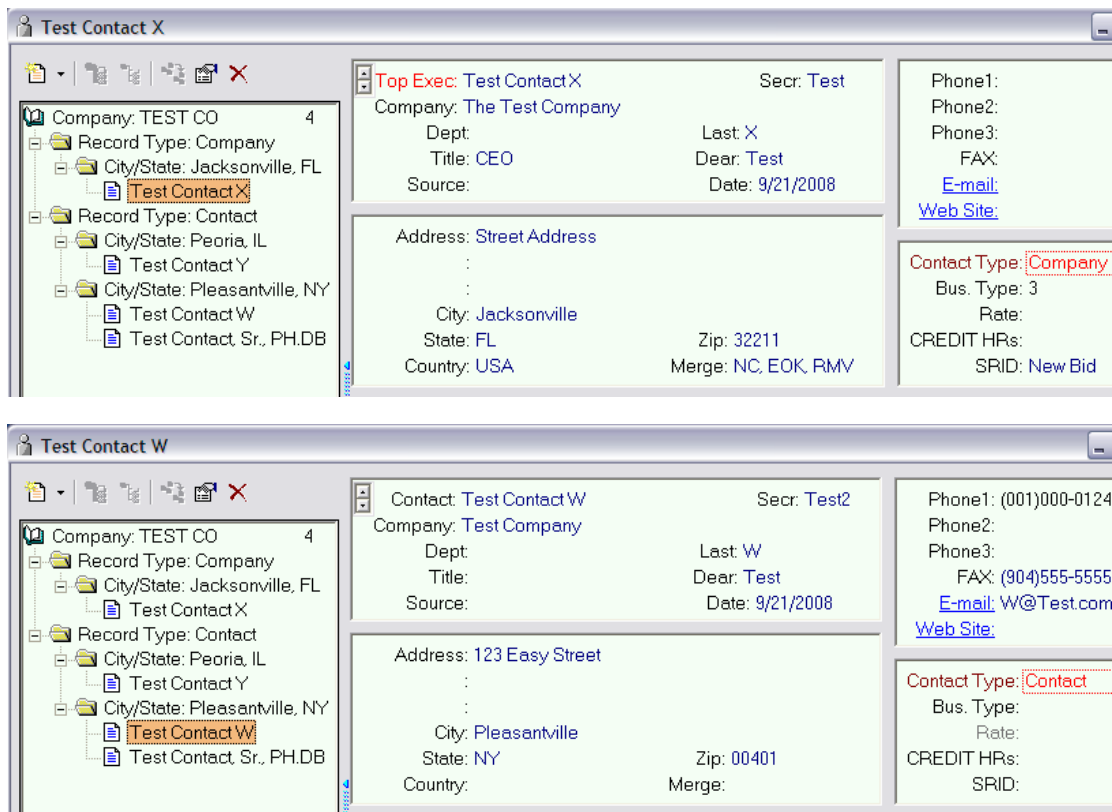
- First, select the Contact record that will be the basis for the Replication;
- Then determine how “high up the tree” you want to go with replacing data (i.e. all records within a specific folder);
- Highlight the appropriate folder, and then use the right-click menu to select **Replicate data**.
- A dialog will appear (left); check **Address** and click **OK**.
- Finally, you will be challenged as to whether you want to complete the Replication (because there is no “undo” for Replications). Click the **Yes** button, and the Replication will be completed.



If you limit your Users to Replications like the one above, Replication is OK. But there is a natural tendency to expand the use of Replication beyond its appropriate role. For example, note the checkboxes for **Key fields** and **User defined fields** in the **Replicate Data** dialog on the previous page. In the Contact-centric model, some of the Key fields—and certainly some of the User-Defined fields—should contain data that is **specific to the Contact**. Therefore, it would be incorrect to Replicate that data to other Contact records, and having the “clean sweep” options to Replicate **ALL** Key fields and **ALL** User-Defined fields on that dialog is simply **dangerous**. Fortunately, **GoldMine does offer a better solution**.

- ❖ Your network drive is like a library; it contains lots of information, and one of the great challenges is to keep all that information in its place, so you can find it when you need it. But there is an important difference between a database and a hard-copy lending library: because your database displays **copies** of the data, there is no need to have more than one original of any document or piece of data. In fact, one of the principles of good database design is to eliminate duplication of data. Copying the Address of one Contact to another Contact, when they both work in the same location, strays from this principle... but only in a minor way. However, as we've seen, over-using Replication can lead not only to seriously violating this principle, but also to downright errors.

GoldMine's **Record Typing** capabilities give us exactly what we need to avoid the over-use of Replication. By dividing our database into Company Type records and Contact Type records, we can have exactly one place to put information about a Company; while still maintaining full individuality for the Contacts. A bit of information like the Fiscal Year End of the Company would go into the Company Type record; while a Contact's birthday would be stored in a Contact Type record.



Above, we have applied Record Typing to our Test data. GoldBox's Org Chart builder was modified to create separate folders for Company and Contact Type records³. Using Record Typing enables us to use different labels for the various Record Types, as with the Contact field, above. Of course, **MUCH** more in the way of Record Type customization is possible; I'm keeping it simple here for the sake of brevity.


³ Because there is a limit of 4 levels for GoldBox-built Org Charts, adding the Record Type level required me to remove the Department level that was shown in the previous Org Charts.

Record Typing comes very close to making GoldMine two (or even more) databases inside the same "envelope". There are special considerations when it comes to reports, filters and queries, of course; once you apply Record Typing, it has to always be kept in mind. But this feature gives us one, and only one, place to store Company data; while also giving us the full flexibility of the Contact-centric model.

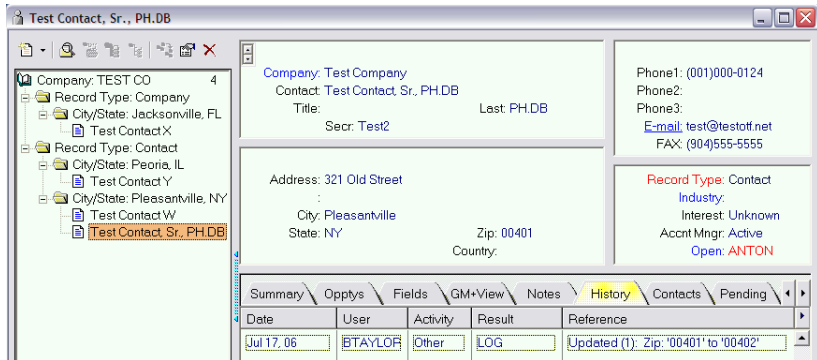
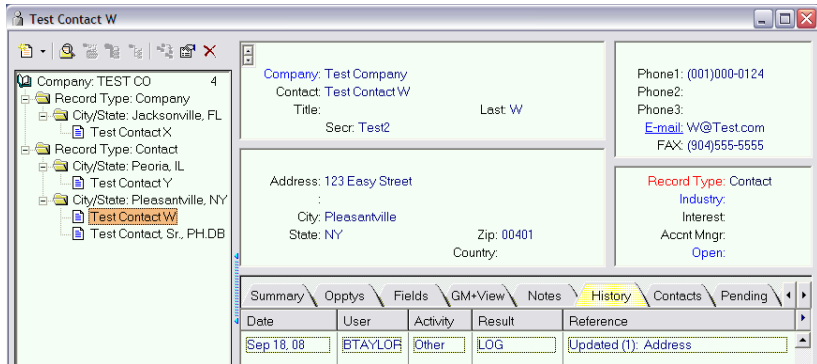
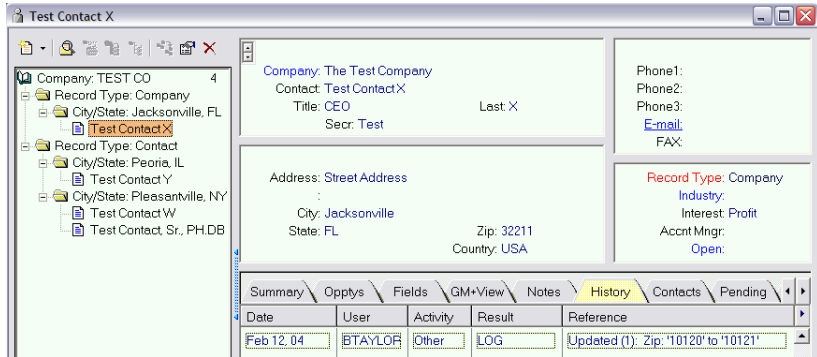
- ❖ Yet another GoldMine feature that's helpful with the Contact-centric model is **Org Chart Roll Up** (available for SQL databases only).

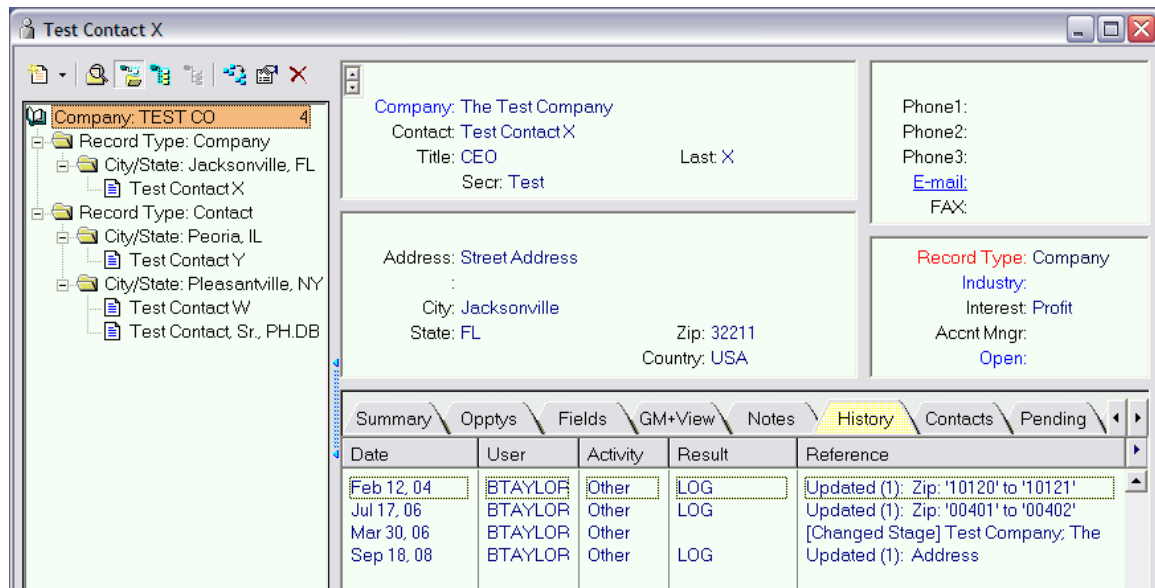
This feature enables us to view all the (Additional) Contacts, Details, Referrals, Pending, History, Links, Members, Tracks, Opptys, and Projects for a chosen Org Chart segment, all together, under the appropriate GoldMine tab.

Here we see the four Test Contacts and their Org Chart. Note that each has only one History record, and that all the dates are different.

Once the Org Charts of the database have been **Optimized** (see GoldMine's Help for details), displaying the tab record data for all the Contact records within a selected folder of the Org Chart becomes a simple matter of pressing the  button at the top of the Org Chart.

On the next page, you can see the result of pressing that button while the entire Org Chart is highlighted. The four History records from the four Contacts are all brought together under this displayed History tab.





Regarding “Additional Contacts” (under the Contacts tab): these records should be used only for Contacts who do **NOT** merit maintaining the kind of data that’s usually found in User-Defined fields. However, you can use the Contacts tab for such Contacts who should receive routine mailings. This is done by assigning Merge Codes, and including Additional Contacts with the proper Merge Codes in such mailings. The same applies to E-mailings (which uses a different set of Merge Codes).

- ❖ GoldMine’s Automated Processes were really designed with the Contact-centric model in mind. They deal almost exclusively with automation involving the Main Contact record, which is to say “people” in the Contact-centric model.
- ❖ As with APs, GoldMine’s canned reports are heavily skewed toward facilitating the Contact-centric model.

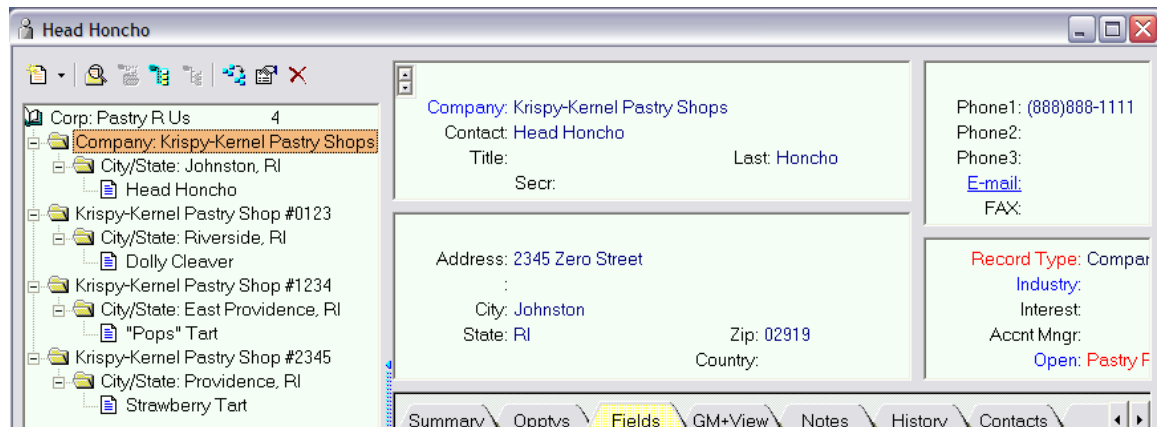
REVIEW: The **Contact-centric** model offers

- Full data capabilities for each Contact, plus special Record Types for Company records, and other Types as required.
- With GoldBox-produced Org Charts, and using the same value in the Company field (or “nearly” the same value), the building and refreshing of OrgCharts can be fully automated.
- All Record Types, or only specific Record Types, can be included in Charts.
- Chart segments can be Activated and used like Groups.
- For speed fill of parts of new records, Replication is available; but it should be limited to that role.
- To get a contextual picture of the activity among the various Contacts at a Company, the Org Chart Roll Up is available for GoldMine hosted in SQL.
- Additional Contact records, which should be used for Contacts who do not require their own Main Contact record, for in-depth data.
- Automated Processes and GoldMine reports are ideal for the Contact-centric model.

Using the Company-centric model — **Company-centric** means using one Main Contact record per Company, and making every Contact at that Company an “Additional” Contact, i.e., under the Contacts tab. The Contact field in the Main Contact record may be used for the highest ranking person at the Company; or for the first person contacted at the Company; or it may be assigned to another use entirely; or it may be left empty.

- ❖ The first “must do” with a Company-centric database is to make a decision about filling that Contact field, and to inform all Users of the rule you’ve made.
- ❖ The second decision to make is whether the Company field means “company”, or “location”, or “corporation” or something else. If you deal with a lot of multi-location companies, you may want to use the Company field to mean “location”, like “Krispy-Kernel Pastry Shop #2345”. You can change the label; you can even make the label dependent on a Record Type, if you like. However, I recommend that you not get too creative when you are first designing your database; installing a large number of customizations from the beginning may make the administration of your database more challenging than it should be, just when you are getting used to the implications of these capabilities.
- ❖ Another thing you may consider (depending on the nature of your data, and especially if you are using GoldBox to build your Org Charts) is what might be called a “conglomerate chart”. This will differ from the Contact-centric style of Org Chart, of course. You may want to use Org Charts to connect different locations of the same corporation to a corporate record; or even different companies within a conglomerate together. In fact, it’s even possible to do both simultaneously.

Here is an example of a Corp/Company/Store Org Chart, built automatically by GoldBox:



The corporation **Pastry R Us** has 3 stores. The Corporate name is stored in Key5 (could be any field), and is used as the top level record of the Org Chart. Each store has a Main Contact record, which keeps the name of the store manager in the Contact field. Note that in the Org Chart, there is also a Company record, just below the Corporate record; it’s the office that controls all 3 stores.

If Pastry R Us began to grow into a conglomerate that included Croissants au Ventre and Bread du Pain stores, all that would be necessary to automatically bring them into the Org Chart on the next refresh would be to have the **Pastry R Us** value in the Key5 field of those records.

So, although the details of the way Org Charts work are quite different between the Contact-centric and the Company-centric models, the advantages of Org Charts apply equally well to both. This includes the ability to Activate Sections and to Roll Up Sections.

- ❖ With the Company-centric model, the Main Contact fields, including all User-Defined fields, must be devoted to the Company, not to individual Contacts. About the only fields that can be User controlled under the Contacts tab are Merge Codes and Notes. Because Merge Code fields are only 20 characters long, anyone using the Company-centric model should consider using single character Merge Codes. **This takes planning!**

- ❖ As noted earlier, GoldMine's Automated Processes and canned reports are really designed with the Contact-centric model in mind.

REVIEW: The **Company-centric** model offers

- A better way to work with multi-location companies than Contact-centric, provided that detailed information about individual people is not required.
- If using an Org Chart building tool like GoldBox, an easy way to work with multi-tiered corporations and conglomerates.
- The same basic features of the Org Chart—Activation, Replication, Roll Up—are available for Company-centric, although they are applied at a higher level.
- Good communications capabilities provided that Merge Codes are well planned and applied.
- Little in the way of Automated Processes or canned reports, as far as individual Contacts are concerned.

My thanks to Bob Gannett and Dave Petonic for their assistance in editing this document...Bob Taylor