



## Outlook: Using a Built-In Promotional Tool

When someone receives an email from you and wants to add you to their Outlook Contacts, they will likely open the message, right-click your name up in the FROM box and choose ADD TO OUTLOOK CONTACTS.

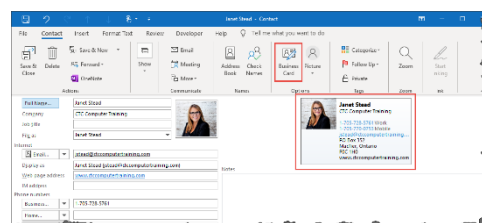
What information (about you) gets added to your Contact List when they do that? Just your name and email address. Why? Because that's all email clients (Outlook, Hotmail, Gmail, etc) are programmed to give them – even if you have included a signature block that also contains your web address, cell number etc.

In today's competitive marketplace, the more of your (contact) information your prospective clients and colleagues have...the easier (and more likely) it will be for them to reach out to you (versus your competitor).

So...what can you do about this? Create a VCard – that's what. And include it in all your outgoing emails. When someone right-clicks your VCard (in the email they've received from you) and choose ADD TO OUTLOOK CONTACTS...their contact record (of you) will be automatically populated with whatever information YOU want them to have.

### 1. CREATE A VCARD. To create a VCard, first add YOURSELF to your own Contact List:

- a. Open up your Contact List or Address Book and start a New Contact.
- b. Fill in all the fields you can/want. Don't fret...this doesn't mean that because you added your Home Phone Number you have to give it to everyone on your VCard – we'll customize the VCard later.
- c. As you populate the contact field with your information – it all appears on your business card at the top-right corner of the contact window (shown here). You can add your picture too, if you want.
- d. When you have finished adding all your information – indicate how much (or little) of your information you want to share on your VCard: click the BUSINESS CARD button up on the CONTACT tab ribbon (in the OPTIONS area).
- e. When the EDIT BUSINESS CARD window appears:
  - i. To DELETE an item from your card – click the item (as mentioned above) – and click the REMOVE button.
  - ii. To MOVE an item above, or below, other items on your card - click on the item (up on the actual card – or down in the FIELDS list) – and click the UP or DOWN arrows until the item appears in the desired location).
  - iii. To fancy up (ok – it's called FORMATTING) field – select it (as mentioned above) and use the formatting options in the EDIT section at the right-hand side of the window.
  - iv. Say your cell phone number is FOLLOWED by the label MOBILE. And you would rather have it PRECEDED by the label CELL: (in blue):
    - Select your cell phone number field.
    - In the EDIT section (RHS) – change LABEL box text to whatever you want (ie, CELL: ) and change the POSITION drop-down from right to LEFT – and click the FONT COLOUR button and select a colour.
  - v. To change the size and position of your picture (if you included one) – use the various IMAGE options (LAYOUT, IMAGE AREA, IMAGE ALIGN) in the CARD DESIGN area in the top-right corner of the window. Sorry...no time to walk you through all of it...I've got work to do!
  - vi. When you're happy with the appearance and information contained on your business card – click OK.
  - vii. Back at your CONTACT window – click SAVE & CLOSE up on the ribbon.



2. Start a new email – I know you don't want to send one right now – just do it!
3. Click inside the MESSAGE BODY area – then click the SIGNATURE button (on the MESSAGE tab – INCLUDE section).
4. Click SIGNATURES... at the bottom of the list.
5. In the SIGNATURES AND STATIONERY window - click the NEW button (beneath SELECT SIGNATURE TO EDIT).
6. Type a name – like JANET'S VCARD – and press [ENTER] (or click OK).
7. Click in the empty signature area – then click the BUSINESS CARD button (above the signature area).
8. Scroll down the list that appears until you find YOUR contact and DOUBLE-CLICK it.
9. Back at the SIGNATURES AND STATIONERY window – click the NEW MESSAGES ▼ (in the CHOOSE DEFAULT SIGNATURE area (top-right)) – and select the SIGNATURE to which you added your business card – then click OK.
10. CLOSE (without saving) the open email window – we only needed it to access the Signatures feature.
11. The next time you send a new email – your business card will appear in the BODY of the message – and (IMPORTANT) your VCard will appear as an attachment. If the recipient RIGHT-CLICKS your VCard and chooses ADD TO CONTACTS...all the information you included on your business card will be added to the contact form.

Not everyone knows to right-click the VCard. If you include a VCard (attachment) – but the recipient still right-clicks your name (up in the FROM box) – they'll still only get your name and email address (so all this will have been for naught). So...you might want to include a short, instructional statement at the end of your emails indicating something like "Right-Click my attached VCard and Add to Contacts to save my business card contact information". I don't know if you want to do that or not – but you do need to figure something out.