Build a Database of Contacts - Template

This template to create a database of contacts (or target users for your email campaigns) can be used across many contexts to collect contact information for various user groups, such as district buyers, EdTech vendors, etc. It facilitates the outreach to current non-users of your offerings and allows the collection of additional information to target and personalize outreach emails to specific needs.

This process also, however, requires substantial manual effort to compile and for non-public entities (e.g. EdTech vendors), contact information may not be easily publicly available. Oftentimes, warm emails (emails from familiar sources) are more effective than cold emails.

**Step-by-Step Guide:**

1. Fill in the template below. We have provided possible headers for a specific purpose (e.g., creating a database of district buyers) but feel free to tweak or add more as needed to reflect headers more aligned with your needs.
2. Fill in the list of all **entities within a given user group** (school districts, edtech vendors) you want to contact. For the example below, you fill in the list of all **school districts** (available from the National Center for Education Statistics NCES: <https://nces.ed.gov/ccd/elsi/>)
3. Gather **names and contact information** of key personnel in each entity
   1. This is the most difficult and time-consuming part as it needs to be done manually. Depending on the user group, the source of this information and the ease of obtaining it will vary. For the example of building a database of district buyers, the information can be obtained from publicly available sources such as school district websites.
   2. Here are some steps you can take for this particular example of building a database of district buyers:
      1. **Create a list of all relevant titles** for your organization’s services
      2. Go to **each school district website** via Google
      3. **Visit the directory or staff page** often under ‘contact us’ or ‘about’
      4. **Identify the official/administrator with a relevant title** based on step 1
      5. **Copy the personnel contact information** into the spreadsheet
   3. There are freelance marketplaces available that allow you to outsource this task, such as Upwork, Prolific, or Amazon MTurk.
4. Link any **relevant additional data** that can help you personalize the outreach effort and target specific user needs.
   1. For the example below, you can link school districts to **district-level data of interest** (also available from the NCES: <https://nces.ed.gov/ccd/elsi/>)

| **School District** | **First Name** | **Last Name** | **Title** | **Email** | **Other relevant details**  **(e.g., State, District Size, Demographic characteristics of the student population, Region, etc.)** |
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**Step-by-Step Guide for creating a contact database for edtech vendors:**

1. Fill in the template below. We have provided possible headers for a specific purpose but feel free to tweak or add more as needed to reflect headers more aligned with your needs.
2. Fill in the list of all **edtech companies** that are potentially of interest
3. Gather **names and contact information** of key personnel in each company
   1. For private entities, this information may be difficult to obtain. Potential sources for contact information include company websites, LinkedIn, free chrome extensions (such as Hunter.io, emailsearch.io or Clearbit), other tools (such as SalesQL, Kendo or Zoominfo), google searches, social media, and industry directories. The following steps can be followed to gather the information.
   2. Here are some steps you can take for this particular example of building a database of district buyers:
      1. **Create a list of all relevant titles** for your organization’s services
      2. **Go to each company website** via Google
      3. **Identify the names** of those in relevant positions
      4. **Search for the web for contact details** using one of the tools mentioned above
      5. **Copy the personnel contract information** into the spreadsheet
   3. When using a freelancer to complete this task, ensure that the instructions you provide are clear and detailed.
4. Find any relevant **additional information**, such as company size or year of founding, using sources such as LinkedIn

| **Organization** | **First Name** | **Last Name** | **Title** | **Email** | **Other relevant details**  **(e.g., Link to website, Short Description, Founding Year, Company size, etc.)** |
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