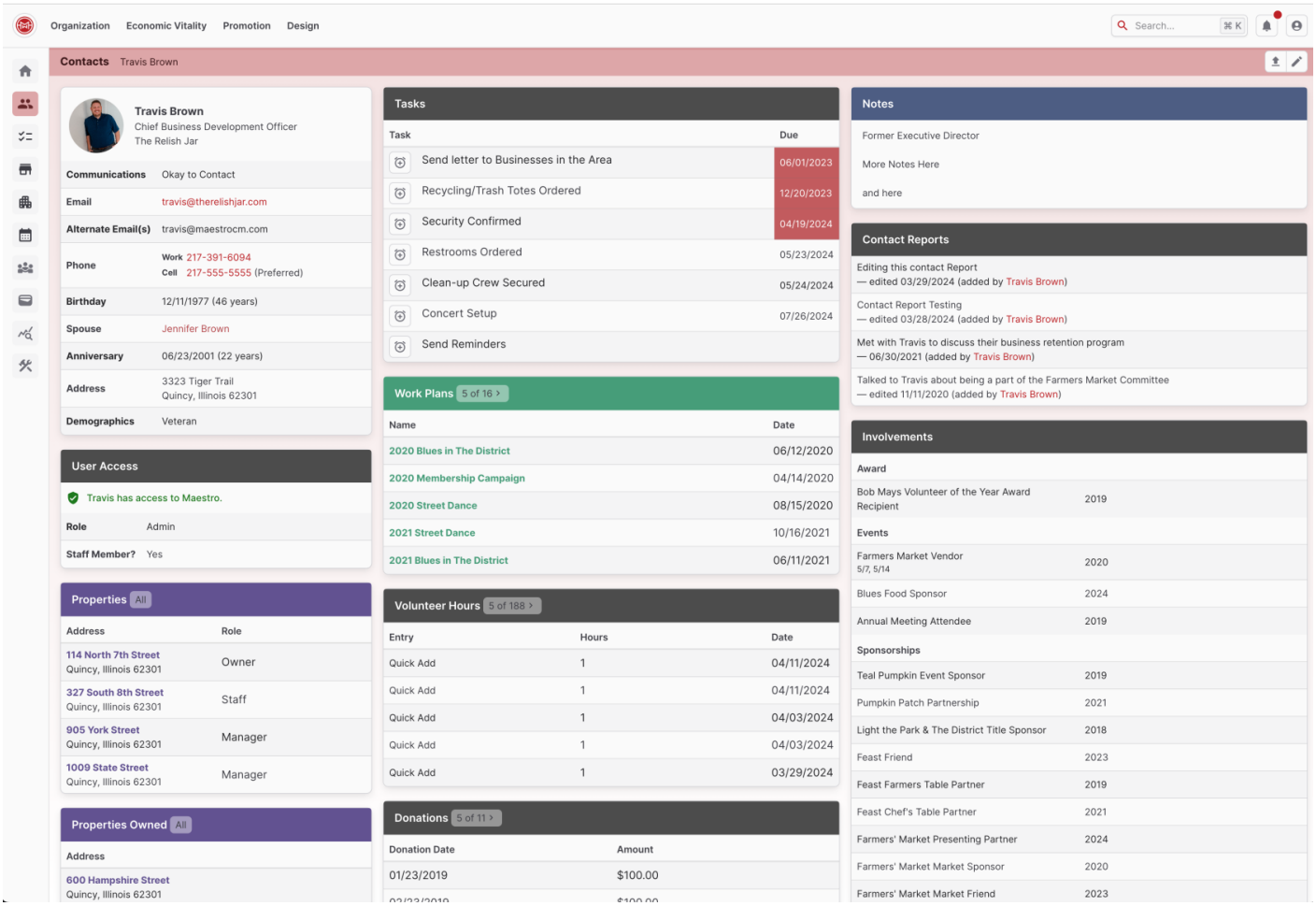
1.03 Contacts

- Contact Profiles
- Involvements

Contact Profiles

To add a contact profile, go into the Contacts section of Maestro and click on the Plus button in the upper right hand corner. This will create a blank profile for you to edit and save.



Required Fields

Individual’s First Name or Company Name
All contact profiles must have an individual’s first name or a company name to be saved.

Initially, the profile template will show both fields with an asterisk, but, after data is entered into one of those
fields, the other asterisk will disappear.

Title Field

This field is used both for a traditional “title” (e.g. Mayor, Judge, Dr., The Honorable, religious titles, etc.)
as well as the contact’s job title/ position (e.g. teacher, engineer, director of development, etc.).

Large Institution Naming

Protocol (Suggestion/Tip)

Do not include department names in a contact’s title. Instead, add the department name to the name of
the company field. This ensures the department name is searchable--which is critical for larger companies
with many staff and multiple departments, like the City of Smallville.

Use: COMPANY NAME, DEPARTMENT/DIVISION NAME
For instance: City of Smallville, Law Department

Company or Involvement? (Suggestion/Tip)
Contact profiles include a “Company” field. For individual contacts, this field is reserved for the individual’s employer. If the contact is a neighborhood association member, board member, etc., those roles should be recorded as “Involvements”. (More information on involvements in the “Involvements” section below).

For instance, a member of the Smallville Historical Commission is employed by Marriott Hotels. In that case, the contact’s “Company” is Marriott Hotels, and one of his “Involvements” is the Smallville Historical Commission.

Address Fields

Maestro allows for one postal address only, so use the address that relates that contact to the organization.
For instance, if the contact lives outside the city but owns a business in the city, use the business address.
If the contact is both a resident and business owner in the city, use your best judgment: Where would this contact like to receive mail from the organization? In what capacity (personal or business) has the contact interacted with the organization?

When to add an Organization vs. a Contact

The majority of the time, we strongly recommend adding individuals in the contacts section and organizations and businesses in the business section.

The one main exception to this rule is when you need to track volunteer hours for a group where the individuals may change from year to year or event to event, like a fraternity or sorority. Since that may be the individual's only interaction with your organization, we don't suggest putting each person into your Maestro system, but instead adding a profile for Delta Delta Delta and then attaching volunteer hours to that profile.

Contact Relationships

Within each profile, Maestro links staff, owners, and managers to their corresponding businesses and properties and vice versa. In addition, Maestro links businesses to their corresponding properties and vice versa.
Currently, profiles within the same module cannot relate to each other, but profiles from different modules can.

2+ Individuals : 1 Organization

- Contact Profile 1 (CP1)
  - Name: Karen Nigosian
  - Company Name: Nigosian Rug Company
- Contact Profile 2 (CP2)
  - Name: George Nigosian
  - Company Name: Nigosian Rug Company
- Business Profile 1 (BP1)
  - Business Name: Nigosian Rug Company

1 Individual : 2+ Organizations

- CP1
  - Name: Rafi Rayes
  - Company Name: Alano’s / T-Mobile
- BP1
  - Business Name: Alano’s Pizza & Subs
- BP2
  - Business Name: T-Mobile

Involvements

Involvements are Maestro’s tagging system. It may be helpful to think about Involvements as custom fields or tags. Involvements can be created for any attribute that the organization wants to track. Involvements are the way to get data out of multiple spreadsheets and into one usable system to see each contact, business, or
property’s complete engagement with the organization. Involvements can be added to any property, contact, work plan or business.

Involvements	
Sponsorships	
Blues in the District Note Partner	2015
Blues in the District Note Partner	2021
Blues in the District Note Partner	2024
Blues in the District Note Partner	2014
Blues in the District Corporate Partner	2023
Blues in the District Concert Partner	2022
Volunteer	
Promotion Committee	2019
Organization Committee Chair	2024
Foundation Board	2020
Foundation Board	2019

This feature is used to track items such as:

- Board of Directors
- Committee Roles
- Sponsorships
- Awards
- Attendance, etc.

Important Note: Involvements are used to track important information that needs to be searched and does not have a designated field. For reference, review the full list of involvements and umbrella involvement categories in the Tools module.

Involvement Categories

Having your involvement categories and your initial involvements created prior to loading data will make attaching those involvements much easier. It is important to have a planned naming structure for your involvements so that you can keep track of them down the road. Please see the section on involvements for specifics.

Search & Reporting

Involvement names and data can be searched from the Search field and from the Advanced Reporting tool. However, the Involvement notes cannot be searched. The Involvement Data field is an open text field, so it can be used for dates as well as any other data a user wishes to search later.

Board Terms & Other Multi-Year Involvements

Some involvements require more detailed information, like dates and positions held. Typically, this issue is most related to boards of director positions (district boards, school boards, city council, etc.). In these cases, use the data field to designate the year or term end date. Use the notes field to designate the position held.

For instance, if a board member is serving a three year appointment, each year would be entered as its own involvement:

- Involvement Name: “Board of Directors”
  - Involvement Data: 2018
  - Involvement Notes:
- Involvement Name: “Board of Directors”
  - Involvement Data: 2019
  - Involvement Notes: Vice President
- Involvement Name: “Board of Directors”
  - Involvement Data: 2020
  - Involvement Notes: President

It is recommended that, at the start of a board member’s appointment or office term, all the related involvements (one for each year) be added. This avoids the likely scenario that the data will not be added annually in a timely manner. This process may require regular maintenance--for instance, if a member’s term ends prematurely or if a director is elected to an office position after his/her first year.

Dating Involvements

It is best practice to utilize the data field to include dates, as shown in the examples above.
A common exception to this would be memberships that use a rolling calendar. For example, if you have a membership campaign and someone can join in June and be a member through May of the following year. In this circumstance, we do advise dating your involvement.

- Involvement Name: "2024/2025 Membership"

- Involvement Data: June (or month they join)
- Involvement Note:

This structure will allow you to generate reports for membership renewals quickly and easily.