Solutions for a *Smarter* Office

Small Business Productivity Applications

The Productivity Challenge

- Small Business
  - Few Employees, Multiple Hats
- Data Data Data
- <u>Productivity</u> – Limiting Factor on Growth
- Limited Investment in IT/Infrastructure

- Goal Today: Share ideas, successes to improve business process and productivity
- Focus: Contact Mgmt & Data Mgmt

Your Challenges

- What are your biggest productivity challenges?
- When are you thinking
  "*There's got to be a better way*"
  - Email?
  - Client mgmt/communications?
  - Invoicing?
  - Data mgmt?

The Ubiquitous Office

- Businesses Runs on MS Office
- Vision: Productive PCs– not depreciating hardware
- Email Management
  ◦ Outlook/Email Clients
  ◦ CRMs
- Data & Databases
  ◦ Access
  ◦ Excel
  ◦ Web

Outlook/Email Clients

- <> Contact Management Tool
- Basic Grouping/Searching – not Integrated
  - DLs / Contact Groups / Email Folders
  - Email Text Searches
  - Contact Searches
  - Calendar Searches
- Distribution List vs. Mail Merge vs. Database Emails
  - DL maximum number recipients
  - Recommend Email Mktg. opt-ins, opt-outs, etc. – stay legal!

Outlook, con't

- Rules – Powerful Time Savers
  - <u>Act on Email based on Criteria</u>
  - <u>Facilitates Database Integration</u>
- <u>Custom Forms</u>
- Exchange Server
  - Shared Calendar
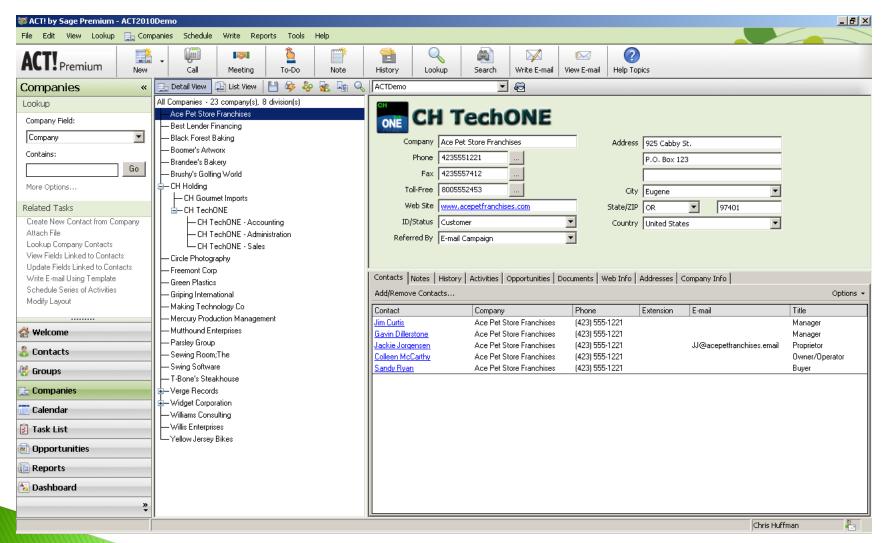 - Shared Rules, Custom Forms
  - Hosted Exchange

CRM Software

- Integrated with Outlook, Gmail, Yahoo, Hotmail, etc.
- Client interactions, including phone logs, email, documents (proposals, presentations, invoices)
- Sales pipeline
- Email Marketing
  - No ISP limitations
  - Database custom emails

CRM, con't

- ACT
- Salesforce.com
- Microsoft CRM
- Goldmine
- …and many more

- Powerful application for any size company, especially multiple employees. Share email, sales, client contact information, calendars, etc.

ACT CRM – Client Mgmt.

ACT CRM – Sales Mgmt.

Pipeline Report by Sales Stage

Date Range: All Dates

Stage	Commitment to Buy			Total for Stage: $479,600.00			Weighted Total for Stage: $467,500.00		
Contact	**Company**	**Name**	**Process**	**Est. Close**	**Prob.**	**Weighted Total**	**Total**	**Record Manager**
Kelsey Reay	S D Enterprises	SD Enterprises-New Opportunity	CHT1 Sales	8/29/2008	100%	$5,000.00	$5,000.00	Chris Huffman
Gracie Anderson	Searchlight Casting	Searchlight Casting-Tempe	CHT1 Sales	7/14/2009	100%	$12,000.00	$12,000.00	Chris Huffman
Claire Haldane	E D Enterprises	ED Enterprises-Install ONE	CHT1 Sales	1/25/2008	100%	$2,500.00	$2,500.00	Ernst Anderson
Louise Harper	Stevenson & Smith	Stevenson & SMith-Office Upgrades	CHT1 Sales	1/17/2010	100%	$5,000.00	$5,000.00	Chris Huffman
Stony Brooke	Duke Industries	Duke Industries-LA Operations	CHT1 Sales	8/28/2009	80%	$9,600.00	$12,000.00	Allison Mikola
Dan Minnick	Django Consulting	Django Consulting-Install TechONE	CHT1 Sales	12/30/2008	100%	$12,000.00	$12,000.00	Chris Huffman
Claire Haldane	E D Enterprises	ED Enterprises-New TechONE	CHT1 Sales	5/17/2010	100%	$12,000.00	$12,000.00	Ernst Anderson
Hayleigh Frieda	American Dreams	American Dreams-Upgrade to Main Office	CHT1 Sales	11/27/2009	80%	$2,000.00	$2,500.00	Chris Huffman

The report is finished.

Total 26

Custom Business Managers

- After Outlook, CRM > custom database
- Manage clients, interactions, sales, inventory, etc.
- Either OTS Industry specific or custom
- Shared information
- Multiple Platforms

Data, Data, Data

- Unlimited and growing sources
- Typically electronic – but not necessarily productive
- Two Goals
  - Limit human interaction with data – data integrity, productivity
  - Turn data into actionable information to drive better business decisions

"*Excel*-lent" Data

- Many small businesses rely on Excel
  - Familiar user interface
- No need to sacrifice functionality
- Data Conversion to Excel – still requires automation
- Transform Data into actionable information to drive business decisions

DataBase Productivity

- Design applications to maximize productivity – database integration and application integration
- Document Creation
  - Web applications, Surveys, etc. to Word
  - Merge Documents
- Custom Invoicing
- DataBase Integration/Effectiveness

Thank You

- If you think there's a better way, there is.
- Utilize the power of your computer
- Logical, consistent, repetitive = AUTOMATE!

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