

Solutions for a *Smarter* Office

Small Business
Productivity Applications

The Productivity Challenge

- ▶ Small Business
 - Few Employees, Multiple Hats
- ▶ Data Data Data
- ▶ Productivity – 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
 - Act on Email based on Criteria
 - Facilitates Database Integration
- ▶ Custom Forms
- ▶ 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
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- ▶ Powerful application for any size company, especially multiple employees. Share email, sales, client contact information, calendars, etc.

ACT CRM – Client Mgmt.

ACT! by Sage Premium - ACT2010Demo

File Edit View Lookup Companies Schedule Write Reports Tools Help

ACT! Premium New Call Meeting To-Do Note History Lookup Search Write E-mail View E-mail Help Topics

Companies << Detail View List View ACTDemo

Lookup

Company Field:
Company

Contains:
Go

More Options...

Related Tasks

- Create New Contact from Company
- Attach File
- Lookup Company Contacts
- View Fields Linked to Contacts
- Update Fields Linked to Contacts
- Write E-mail Using Template
- Schedule Series of Activities
- Modify Layout

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Welcome

Contacts

Groups

Companies

Calendar

Task List

Opportunities

Reports

Dashboard

All Companies - 23 company(s), 8 division(s)

- Ace Pet Store Franchises
 - Best Lender Financing
 - Black Forest Baking
 - Boomer's Artwork
 - Brandee's Bakery
 - Brushy's Golfing World
 - CH Holding
 - CH Gourmet Imports
 - CH TechONE
 - CH TechONE - Accounting
 - CH TechONE - Administration
 - CH TechONE - Sales
 - Circle Photography
 - Freemont Corp
 - Green Plastics
 - Gripping International
 - Making Technology Co
 - Mercury Production Management
 - Mutthound Enterprises
 - Parsley Group
 - Sewing Room.The
 - Swing Software
 - T-Bone's Steakhouse
 - Verge Records
 - Widget Corporation
 - Williams Consulting
 - Willis Enterprises
 - Yellow Jersey Bikes

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Company: Ace Pet Store Franchises
 Phone: 4235551221
 Fax: 4235557412
 Toll-Free: 8005552453
 Web Site: www.acepetfranchises.com
 ID/Status: Customer
 Referred By: E-mail Campaign

Address: 925 Cabby St.
 P.O. Box 123
 City: Eugene
 State/ZIP: OR 97401
 Country: United States

Contacts Notes History Activities Opportunities Documents Web Info Addresses Company Info

Add/Remove Contacts... Options

Contact	Company	Phone	Extension	E-mail	Title
Jim Curtis	Ace Pet Store Franchises	(423) 555-1221			Manager
Gavin Dillerstone	Ace Pet Store Franchises	(423) 555-1221			Manager
Jackie Jorgensen	Ace Pet Store Franchises	(423) 555-1221		JJ@acepetfranchises.email	Proprietor
Colleen McCarthy	Ace Pet Store Franchises	(423) 555-1221			Owner/Operator
Sandy Ryan	Ace Pet Store Franchises	(423) 555-1221			Buyer

Chris Huffman

ACT CRM – Sales Mgmt.

Print Preview

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
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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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