


# 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?
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# 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

**CH ONE CH TechONE**

Company: Ace Pet Store Franchises  
 Phone: 4235551221  
 Fax: 4235557412  
 Toll-Free: 8005552453  
 Web Site: [www.acepetfranchises.com](http://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
<a href="#">Jim Curtis</a>	Ace Pet Store Franchises	(423) 555-1221			Manager
<a href="#">Gavin Dillerstone</a>	Ace Pet Store Franchises	(423) 555-1221			Manager
<a href="#">Jackie Jorgensen</a>	Ace Pet Store Franchises	(423) 555-1221		JJ@acepetfranchises.email	Proprietor
<a href="#">Colleen McCarthy</a>	Ace Pet Store Franchises	(423) 555-1221			Owner/Operator
<a href="#">Sandy Ryan</a>	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

# 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
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# 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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