

# Top Ten Technology Tools

By Ramona Creel

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As a small-business person, you probably realize that AUTOMATING your office is becoming crucial to success. How many times have you been berated by your colleagues for not having an e-mail address, or not being able to fax over a document from your home office? The speed of business these days is measured in nanoseconds -- the only way to keep up and stay competitive is to get "plugged in." But where do you start? This list includes all of the major technologies you should consider for your business -- as well as a few suggestions for making smart consumer decisions.

## FAX

Although most of the business world has an e-mail account, faxing still holds its place as one of the most important technologies you can participate in. Many times, you will need to send a copy of a paper document that you didn't create in your computer to a colleague or prospective client -- and faxing is the way to go. You have several options when it comes to selecting a faxing vehicle. The first is the traditional stand-alone fax machine -- fairly inexpensive, by today's standards. The good news is that we've moved beyond the thin, slick, hard-to-tear fax paper of the past -- and you can now receive faxes on regular computer paper. The bad news -- for a small or home-based business person -- a fax machine is another piece of equipment, destined to take up precious space in your office.

If limited room is an issue, you can always opt for a space-saving all-in-one machine. These usually combine your printer, fax machine, copier, and possibly scanner in one compact unit. Although more expensive than a standard fax machine, these wonders are often less expensive than buying the 3 or 4 separate pieces of equipment. But keep in mind that the "all-in-one" machine suffers from the same limitations as those TV's that have a built-in VCR -- when one component goes, you have to give up the entire package to get it fixed. So if the faxing section of your machine needs work, you will also be without a printer and a copier while you take it in for repair.

The third option is very attractive for entrepreneurs who have limited space -- and for techies who create a lot of documents directly from their computers. You have the option of choosing from a variety of ONLINE FAXING services. You can either create a new document in your computer or scan in an existing paper document. Then, using a program like WinFax, or one offered by an online service, you send your document out directly through your modem -- no need for a separate machine! This is also a tremendous time (and paper) saver, since you don't have to print a hard copy out before faxing it. You can even receive faxes over the internet with one of these special services. You have your faxes sent to a special fax number (some free, some with a charge), and

the internet company in turn forwards your faxes to you as an E-mail attachment. You can read your fax on the screen -- it looks just like a copy of the page sent -- and only print it out if you need a hard copy. Visit [www.onlineorganizing.com/Online\\_Fax\\_Links.htm](http://www.onlineorganizing.com/Online_Fax_Links.htm) for a list of websites offering internet-based faxing services.

## TELEPHONE

These days, telephones are more technologically advanced than every -- I'll bet Alexander Graham Bell never imagined "call-forwarding," "teleconferences," or "speed-dialing!" And depending on the type of phone you have, your extra features may number in the dozens. Unfortunately, most of us barely have a clue how to turn the volume down on the ringer, much less take advantage of all the marvelous goodies our phone systems offer. As a small-business person, it is your responsibility to know your technology -- so pull out that MANUAL! Plan to spend a day familiarizing yourself with all of your phone's features. Set your speed-dial numbers, learn how to set up a three-way call, and discover the value of using your intercom system. It may take a minute to figure out, but these features will save you a ton of time in the long-run. Just imagine how much more productive you can be if you can stop saying to people, "Wait a minute, I'm going to try to put you on hold -- but if I lose you just call me back."

While we're on the subject of phones, let's talk about what holding that phone on your shoulder is doing to your neck! If you spend a lot of time on the phone, one of the best investments you can make is a hands-free headset. These little babies either plug into your telephone or offer a remote phone pack that allows you to wander away from your desk while talking (and if you already have a cordless phone, you can accomplish the same goal with less expense.) Picture the freedom of being able to carry on a business conversation while typing on the computer, or walking over to your files to check a reference -- or even while putting in a load of laundry! I've been known to make business calls while doing dishes (ah, the joys of working from home!) Even if you just like to be in a peaceful setting -- like my client who does her phone coaching from the sunroom -- while talking to clients, it's worth it.

Finally, we have to discuss the dreaded cell phone. I think a quote from A Tale of Two Cities is an appropriate way to describe the cell phone age -- "These were the best of times, these were the worst of times." Cellular phones offer a great deal of convenience -- but they are easily misused. First, let's make it very clear that owning a cell phone does not mean that you have to be accessible 24 hours a day. The two most important skills to learn when owning a cell phone are not giving the number out to everyone on the planet, and how to turn it off (or let it go to voice mail). The day that you let your cell phone run your life is the day when it stops being useful to you. That being said, you can increase your productivity tremendously with a cell phone. You can return calls while stuck in traffic, check your voice mail easily from any location, and make sure that you don't play phone tag with your most important client. But please use your cell phone responsibly -- if you are going to make or receive calls while on the road, use a headset (I'm personally tired of being run off the road by folks with one hand on the wheel and one hand holding a phone!)

## VOICE MAIL

Voice mail has gotten a bad rap in past years. But it isn't voice mail itself that is evil -- it's the inappropriate and irresponsible use of it. Voice mail is actually a wonderful time-saving technological tool. Think about it -- you are trying to set up an appointment with a client who is never at his or her phone. Rather than calling endlessly, hoping to catch this person live, you can take care of all your business dealings by leaving a message. I schedule at least 50% of my business appointments through the skillful use of voice mail.

"Wait a minute," you say, "I always end up just playing phone tag when I leave a message." Let me

suggest, then, that you aren't leaving the right kind of message. Just saying, "Hey it's \_\_\_\_\_ -- call me," isn't going to cut it. You have to be specific about why you are calling and exactly what kind of response you require from the person on the other end. A proper voice mail message might sound more like this: "I'm calling for Jim Greene -- this is Ramona Creel from OnlineOrganizing.com. I'm just calling to schedule our next organizing appointment. I'm free on Tuesday the 12th at 2PM and Friday the 15th at 10 AM -- please call me back by the end of the day and let me know which of those times work for you. My number is 404-607-7857, and I'll be here until 3:00 today -- but you can just leave me a message if I'm not here." Very specific, with a deadline and concrete instructions for getting back in touch with me and getting me the information I need.

Of course, the same is true for the greeting on your answering machine. If you just say, "Hi, this is \_\_\_\_ -- leave me a message," you aren't going to get many useful messages. Be just as specific about what you need and when you can be reached on your own voice message. "This is Ramona Creel. I'm out of the office today, but will return tomorrow at 9AM. Please leave a message -- including your name, phone number, the purpose of your call, and the best time of day to reach you -- and I'll get back with you. I try to return all business calls within 24 hours." That last part is critical -- most people who express frustration with leaving a message say that they hate being left in voice mail limbo -- not knowing when the person will return their call. Let folks know when you will get back with them -- and then stick to that promise -- and they will be more than happy to leave you a message.

## COMPUTER PROGRAMS

There are so many programs out there that can help you be a more efficient and successful business person -- I hardly know where to begin. But we'll talk about three of the "biggies" here. Let's begin with office suites. Whether you are using a Mac or a PC, your business will run much smoother with three basic office tools. word processing programs -- like Word or WordPerfect -- allow you to create time-saving templates, use the merge feature to send out mass-mailings in a snap, and generally make document preparation much easier. spreadsheet programs -- such as Excel or Lotus -- can help you tally financial figures, create easy checklists, and maintain lists of important information. And database programs -- like Access -- take the stress out of maintaining detailed information about your customers and prospects. And, of course, you can always purchase an expanded office suite -- one that includes presentation, desktop publishing, and calendar programs. But even if you never install another program on your computer, at least have these main three.

Another major headache for small business owners is financial record-keeping. Staying on top of your books used to require a good calculator, a ledger book, and a lot of patience. But now you can choose from a variety of accounting programs that will reduce the time you spend on record-keeping, and increase your accuracy. The most popular and expansive business program is Quickbooks, but you can get similar features with Peachtree Accounting, Microsoft Money, and others. Whichever package you buy, look for three important features -- a customizable chart of accounts, a tax planning feature, and the ability to generate detailed reports. You may also want to look for a program that can track sales tax (if you sell a product) or payroll (if you have employees). And you will probably want to consult with your CPA when getting started, to make sure that your computer records accurately reflect the information your accountant needs at tax time.

And finally, we come to contact managers -- one of the finest technological advances of the past few decades! Most contact managers will come with a calendar (for tracking appointments and recurring reminders), an address book (for storing names, phone numbers, e-mail addresses, etc.), and a task list (for tracking your upcoming "to-do's"). But you should look for some additional features, as well, if you really want your contact manager to make your life easier. The first two relate to finding information -- the ability to categorize your contacts into groups, such as "current

clients," "prospects," and "friends" -- and the ability to search for information using keywords. These functions will cut down on the time you spend hunting for a phone number when you can't remember the person's name! It's also good to select a contact manager that can link you directly to the internet -- where you can send and receive e-mail and connect to the web all in the same program where you store your address book. Finally, if you spend any significant amount of time out of the office, it might be handy to have a program that you can synchronize with a PDA (like the Palm Pilot). This allows you to transfer all of your contact and calendar information to your PDA for portability -- and to update your desktop when you make changes on the road.

## INTERNET ACCESS

There is more to internet access than just surfing for movie times! The internet offers a plethora of resources that you can put to use in your business. The web is a wonderful place to research your competition and stay on top of trends in your industry. It may take a little digging to find what you need -- check out some of the larger consulting firms and government databanks for general statistics -- but the time spent is well worth it. And don't overlook the value of the many e-zines and online newsletters available on the net. You can substantially increase your knowledge base without a lot of effort by signing up for these monthly and quarterly publications. Find out everything from how to get organized to the latest investing trends with just the click of a mouse.

You can also find a variety of business development sites that will help you hone your skills and increase your profits. It's all out there -- everything from setting up a home-based business to posting a press release to finding the best benefits package to learning how to improve your public speaking. And you will also trip over a league of online consultants who are more than eager to guide you through the shark-infested waters. Marketing specialists, web designers, sales trainers, financial analysts -- it's no longer necessary that you have an offline connection to find good professional help. Finally, the web is an outstanding resource for your clients. Everyone in business knows that you make a big impression if you can be a "gatekeeper" -- the one who knows where to find all the dirt. If you can point people toward the professionals, supplies, reference information, and other resources they need to get the job done, you come off as a hero!

## E-MAIL

E-mail is a wonderful way to keep in touch with colleagues and clients around the country -- at any hour of the day, without worrying about inconveniencing anyone. With most internet providers, you can check your e-mail over the internet from any computer, and you can stay in touch easily and inexpensively while you travel. Some people feel that e-mail has DEHUMANIZED communications -- but I would disagree. Sending an e-mail should be just like writing a letter -- and it's the fact that we've lost the fine art of letter-writing that has made e-mail so impersonal. Because e-mail is quick, folks have a tendency to whip off a note with no greeting, no structure, poor grammar, and no closing. There is no reason for this, considering the many options that today's e-mail programs possess.

You can set up a variety of e-mail templates for common messages that you tend to send over and over again -- such as sales letters, follow-ups, and answers to common questions. Then all you have to do is customize the message just a bit for each individual situation. This saves time and allows you to make sure you express your thoughts clearly and completely each time. auto-signatures are also terrific for adding an extra marketing plug to your message. Create one standard signature that expresses your company's mission and gives your contact information -- or develop several that are customized to the needs and interests of the different populations you serve. And don't forget about autoresponders -- a great way to send an e-mail automatically when someone requests information from you. Let's say that you have published an article, and you want people to be able to request a copy of that article with instructions for reprinting. Just set up a

separate e-mail address for that article and put your text and instructions in the autoresponder. Anyone who sends an e-mail to that address will receive your article automatically. If your e-mail program doesn't support the autoresponder feature, there are sites on the internet that will set up autoresponders for you.

Your e-mail program can also help you to deal more effectively with incoming messages. First, don't just leave all of your incoming e-mails sitting in your in-box -- create a series of folders (like you would in a filing system) for sorting messages. These folders can either be labeled according to the subject ("newsletters," "personal messages," "client correspondence") or according to what you need to do to it ("to research," "to respond," "to read") -- whatever works best for you. As you download your messages each day, take a moment to sort them into the appropriate folder. Then, set aside time each week to empty those folders. You might consider having two kinds of folders -- action items and reference, making a distinction between e-mails you need to act on and ones that you are simply keeping for future reference (and the same is true for "sent" items). If this seems like too much work, see if your e-mail program has a filter feature -- an automatic system of recognizing and sorting messages by sender, subject, or keywords.

## WEB SITES

Every business on the planet seems to have a website these days -- but most of them are terrible! Let's get something straight right now -- just slapping up a page on the internet isn't going to bring you business. Websites are just like any other marketing medium -- you have to make it attractive, functional, and interesting for anyone to pay attention. But how do you do that without breaking the bank? You can consider hiring a web-designer to build a site for you, but beware! A lot of people jumped on the internet bandwagon back in the early 1990's, took a few evening courses, and called themselves WEB designers. That doesn't always mean that they know what they are talking about. You might do better (both financially and in terms of technical competency) to get a college student who is majoring in web design to help you out. And if you're a total control freak (like me!), you can get one of the WYSIWYG ("what you see is what you get") web design programs -- like Front Page or Hot Dog. These are generally as easy to use as a word processing program and are great for basic web design -- but expect to be severely limited in your capabilities when it comes to higher web functions.

The first key to web design is FUNCTIONALITY. Unless you are a graphics firm or a multi-million dollar company, it's best to work with the lowest common denominator. Assume that everyone who visits your site is using a 386 computer and has the oldest possible version of Netscape. That way, whatever you put on your site, everyone will be able to see it and use it. This means you want to focus on speed -- if people can't get around your site quickly, they won't stay very long. Avoid huge graphics, overly-long pages, and other features that will cause your site to load slowly on a phone modem. Remember, most of the world still doesn't have access to DSL! You also want to keep navigation in mind -- if people can't find what they are looking for, they won't stay very long and they won't ever come back! Include a site map, a "you are here" bar on each page, and have a logical structure in mind before you start putting pages together. It's best to begin with a flow chart of what you want on your site and how it will link together first.

The next step in web design is to make it INTERESTING. You are competing with information overload on the net, and your site needs to offer something that others don't if you ever hope to catch anyone's eye. Content is one of the top features people look for on the internet -- teach them something they don't know, provide them with a list of online resources, or give them a new perspective on an old issue. And your content needs to change frequently to attract people back to your site. You can also throw in a little interactivity as a bonus -- quizzes, polls, forms, question and answer sessions -- get your visitor involved. And don't forget the value of special offers. Even if you are just setting up an "electronic brochure" about your business and don't intend to get involved with

e-commerce, you can still give them a reason to buy from you. Offer an "internet coupon" that may be redeemed offline for your services, give them a discount if they contact you by a certain deadline, or offer a free gift when they refer their friends to you. All of the things you do to market your business offline -- newsletters, coupons, sale notifications -- can be duplicated with ease on the web.

## PERSONAL INFORMATION MANAGER

It's funny -- no one ever really cared about having every single piece of contact information at their fingertips, before technology took over. If you were out and about and someone asked you for a phone number, you would have said, "Sure, I'll call you with that when I get back to my office." But now, with PIMs and PDAs (like the Palm Pilot) so popular, people are almost shocked when you don't pull your entire database out at lunch!

Scoff though I may, there are still some great benefits to having a PDA -- the first being the incredible convenience of having any piece of contact information in your database right at your fingertips. And you have a tremendous amount of memory, so you don't have to worry about space limitations. You can also keep your calendar close at hand -- recording new appointments and reminders with the tap of a stylus. And rather than having to transfer your to-do's from one day to the next by hand, you can simply slide unfinished items over to a more convenient time. With some of the newer models, you can even set up a wireless internet account and access the web and e-mail via your handheld. But best of all, your PDA can be synchronized with the contact manager on your home computer. Just select a contact management program that can interface with your handheld (ACT and Outlook are two easy choices), set up a docking port (looks like a cell-phone recharger), plug in your PDA, and your computers will automatically update the most recent changes in information to both computers.

Now, here's the down-side. PDA's run on batteries -- and if you let the batteries die without backing up your information, you will lose everything (it's happened to more than one of my clients). And just like the contact manager on your computer or the planner in your briefcase, a PDA is useless unless you COMMIT fully to it. That means letting go of the paper calendar and recording all of your appointments in the handheld -- and tossing the business card rolodex in favor of tracking your contact information electronically. If you try to keep two kinds of systems going at once, you will just get confused and frustrated with both. Finally, there is a learning curve for using a PDA -- just figuring out how to write with a stylus will take a minute. If you are having a hard time mastering the special lettering techniques a PDA requires (to recognize handwritten notes), go for one with a small typing keyboard.

## SCANNER

When I first started my business, my husband wanted me to get a scanner. And I said, "What on earth for?" Years later, I am kissing his feet daily for making that suggestion! A scanner is one of the most versatile pieces of office equipment you can ever own -- and this is doubly true if you run a small home-based business with limited space. I use mine to death. And they are very reasonably priced, these days -- no more than the cost of a printer (and sometimes less). But before you buy a scanner, think about what you plan to scan. These machines come in all sizes and with all kinds of functions. If you plan to scan legal-sized documents, make sure you at least get an 8 ½" x 11" scanner. If you want to be able to edit the text on a document you have scanned, get one with OCR (optical character recognition) built into the enclosed software. And be sure to talk to other people who have used the scanner you are considering to find out about its quirks, bugs, and features.

Scanners can be incredible space-savers, replacing other bulkier equipment in your office. If you

don't have room in your office for a full size Xerox machine, you can always use your scanner as a copier. just scan the document in, and print as many copies as you need out on your computer's printer. And that goes for black and white as well as color copies (if you have a color printer). There is also no reason to have a fax machine in your office when you have a scanner. Just set up your computer with an internet-based faxing program (like WinFax or one of the online services), scan your document in, and fax it directly from your modem. Most scanner software also allows you to link directly to your e-mail program, sending scanned items as attachments. And if you are running low on space in your file drawers, why not scan some of your documents into the computer and save them on a DISK or CD-ROM? Unless you need an original of that document, why keep the paper? You can always print it out or fax it or e-mail it later, if you need to.

And the OCR feature found with most scanners brings document creation to a whole new level. Let's say that a colleague faxes you a notice about a networking function, and you would like to send that notice off to some of your other friends. But the page is messy and you really don't want that big fax notification at the top of your sheet. You can scan the document into your computer, use your scanner software to clean up the page, and even add some additional text, if you would like. Then you just shoot the new document on out to your other friends. Or let's pretend that you receive a printed report from a client and need to change some of the wording. The last thing you want to do is retype the entire document. So you scan it in, use your scanner software to import the document into your word processing program, and make the necessary changes. Voila! And don't even get me started about the graphic possibilities. If you do any kind of design work -- creating your own marketing materials, putting together a website -- the possibilities are endless. Just scan in your graphic and export it into Publisher or PhotoShop or whatever program you use for design, and go to it!

## PAGER

Okay, I've saved the most offensive piece of technology for last (that was a little subjective, wasn't it?!) Pagers embody sort of a "yin-yang" of good and bad -- convenience and connectivity paired with constant interruptions and a pressure to respond immediately. And my favorite is the people who page you with a "911" after the number -- indicating that their issue is an emergency -- and then they ask some inane and completely non-urgent question when you call them back! So you will have to draw your own boundary lines around how you use your pager -- who you give the number to, how quickly you will return calls, and when you turn it off. But there are some great technological features that can save you a lot of headaches and make using a pager much less intrusive.

If you need to stay connected on many levels, consider a web-enabled pager. This device allows you to receive e-mails and internet updates on the go. In many cases, you can also respond to e-mails that require immediate attention. You can even hook up with a variety of reminder services that will send you a page to remind you of meetings, medication times, and other important daily events. You can also talk to your pager dealer about having your voice messages transferred to your pager. In fact, many pagers now offer multiple messaging options -- people can leave the typical numeric page, a voice message, or (in some cases) a typed message which you read on a small display screen. And if you want to save space and avoid carrying too many devices around with you, find a cell phone with a built-in pager.

Of course, the fact that you have a pager doesn't mean you always have to respond to it. With the old pagers, you either ignored the beeping or turned it off -- meaning that no one could reach you. But now, especially with the voice-enabled pagers, you can have your party transferred to voice mail, where they can leave a message that you will pick up at a later time. And you always have the option to turn the thing to vibrate rather than beep -- a courtesy to those around you when in a meeting, movie, or other occasion when you don't want to disturb others.

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