



JBA Update on Computing

October/November 2007

James Boyd Associates, Brookside Professional Plaza 2, 37 McMurray Road, Suite 1102
Pittsburgh, PA 15241-1632

www.jamesboydassociates.com info@jamesboydassociates.com (412) 833 0805

Feedback/Follow-up

INSIDE THIS ISSUE

- 1 Feedback/Follow up
- 1 JBA Partners
- 2 Two basic technology categories
- 2 What do I need to know?
- 3 Seven Fundamental Questions
- 4 Reasons?
- 5 Next Issue Topic – Help us decide the topic

This is our third newsletter in a series.

The first one dealt with **Office 2007** family of products. This application has made its way into most network environments and will certainly have an increased presence by next year.

The second issue covered **Microsoft Vista** packages. Vista has not made a huge impact on business users as of this writing. Microsoft has recently announced that the older XP Professional will still be made available until June 2008.

We have made the transition to Vista and Office 2007 in our office - anyone with questions - give us a call.

Newsletters can also be viewed here

<http://www.jamesboydassociates.com/Newsletter.htm>

JBA Partners

“Smart Solutions for the Professional Office”

Current list of active JBA partners include:

- Microsoft (Certified Partner & Small Business Specialist)
- Dell (Solution Provider - Direct)
- Sage Software (ACT! Certified Consultant)
- Tech Data Corporation (Direct Reseller)
- Javacool Software (Authorized Software Representative)
- jBASE/mvBASE (Authorized Vendor)

Two basic technology categories

Making the case for a product such as ACT! by SAGE.

1. What is a Personal Information Manager (PIM)?

PIMs, such as Microsoft Outlook and PDA software, were designed to help you organize basic personal information for a single user. They typically include an address book, calendar, and to-do list, mimicking the paper-based format of each. PIMs enable you to maintain your personal information, as well as basic information about contacts, but do not allow you to integrate information such as linking documents or e-mail communications to a contact.

Some PIMs provide basic contact tracking and searching functionality. For example, a PIM may offer the ability to attach notes to a contact, but it would not provide a historical view of that relationship. Piecing together relationship histories with a PIM would require a great deal of time and patience, plus supplemental applications - such as spreadsheets or other documents.

2. This brings us to - What is a Contact & Customer Manager?

A contact and customer manager allows you to manage all tasks and information related to developing and maintaining relationships with the people, groups, and companies with whom you do business and is meant for a multiple users. Contact and customer management involves a variety of activities, including the ability to:

- Centralize critical contact and customer information and stay organized - accessible by multiple users.
- Manage and grow business relationships through top-notch communications.
- Prioritize your work to stay on top of appointments and tasks.
- Forecast and track sales opportunities for an improved bottom line
- Access and report on information quickly for a complete view of customer interactions.
- Improve efficiency by integrating the applications you use every day, such as Microsoft Office (Outlook, Word, Excel, etc)

This is meant for the day-to-day management of contact information by an individual, workgroup, or corporate team - regardless of location.



*JBA's recommendation
is
ACT! by SAGE
Premium*

What do I need to know?

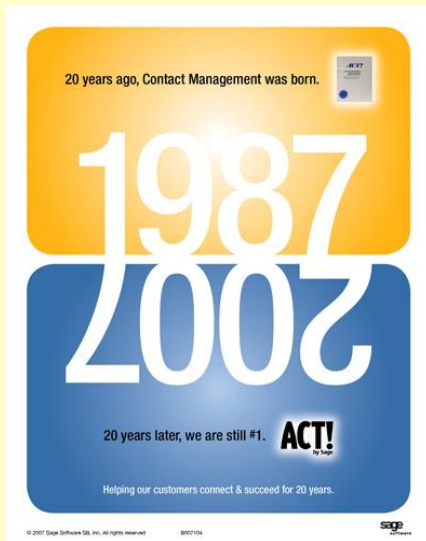
Seven Fundamental Questions

1. Have you ever wanted to organize all of your business data about a contact, customer, or company, but couldn't figure out how to neatly compile it from multiple places and applications?
2. Have you ever wasted time searching for a key piece of customer information or needed to retrieve exactly what you sent to a customer or prospect?
3. Have you ever wished you had a personal assistant who kept you informed of every upcoming appointment, important date, and task?
4. Have you ever wanted an automated way to create and deliver customer communications, instead of spending hours or days creating them individually?
5. Have you ever wanted to make an application work the way you want it to work, or wished multiple applications would work together?
6. Have you every wished you could gain clear insight into the exact status of all current opportunities - whether for yourself or for your team?
7. Have you ever wished for a "bird's eye view" into key areas of your business?

If your business requires only minimal, isolated contact data and the ability to schedule basic appointments and to-do items, then a PIM may be suitable.

However, if you are a relationship-driven business professional, maybe your business needs have evolved to require a more powerful tool to enable further growth.

Making the case for a product such as ACT! by SAGE.



So why ACT! by SAGE?

The Office Professional

- Keep important contact details in one place - so you have quick access to the information you need
- Manage your daily responsibilities so important calls, meetings, and to-dos don't slip through the cracks
- Communicate more effectively with your contacts by having history and action items available at the ready
- Use approved templates for emails and letters
- Full integration with Microsoft Word, Excel and Outlook - including emails, tasks, calendar, etc.

Reasons?

Managers

- Streamline daily functions so your team can focus on business tasks, not administrative tasks
- Assign tasks to your team as necessary and monitor progress
- Centralize contact information to enhance data integrity, best practices, reporting accuracy and provide standardization throughout your organization
- Allocate resources as necessary to stay on business goals as the day-to-day information changes
- Review Tasks and Opportunities for everyone on your team - at your location or remote locations
- Use standardized reports or Excel for true trend analysis
- Improve business productivity & stay on top of your deliverables

Next Issue Topic

As of this writing - our next topic has not been chosen.

Help us chose a topic - **what is your biggest problem with computers?**

Next edition is scheduled for the January/February timeframe.

Feedback Section

- We are looking for constructive ideas as to how to make this publication more meaningful. So let us know...
- That you received it
- That you read it
- Your opinion as to the content
- Of other topics of interest that you would like to see
- If someone else within your organization would like to be included on our distribution list
- If you know of other organizations that would benefit by utilizing our services - a reference would be great!

James Boyd Associates

Brookside Professional Plaza 2
37 McMurray Road, Suite 1102
Pittsburgh, PA 15241-1632

Phone:

412 833 0805

Fax:

412 833 1295

E-mail:

info@jamesboydassociates.com