



Key Business Systems

Tools & Technology

Keep your business running smoothly & stay productive

Tools & Technology to Feed Your Productivity

Systems are a key component to running a successful business and you can't have systems without tools. This list will give you a few tools and technology pieces that can be used inside of the systems that you create for your business. There are so many out there and not everything out there is a fit for everyone. Make the time to explore any tool, application or software that you're considering to see if it's a good fit for you and for your needs. Also keep in mind that you should review what you're using every once in a while to see how it shapes up against new tools that hit the market.

Project Kickstart is an easy way to manage your projects and events. Create timelines, assign tasks and resources. If you're more technically inclined or have a need to share projects on a larger scale, **Microsoft Project** might be the right fit for you.

Zoho- This is an online integrated project management solution that simplifies and speeds projects. Good for any size team and keeps everybody on the same page so that you end up with a coordinated, unified process that slashes project time, saves money, and enhances the quality of your projects. Organize tasks and who is doing what, plan effectively, and easily track time. There's a bug tracker to find bugs with workflows and business rules and quickly fix them. Reporting lets you see your progress and you're able to manage things from anywhere.

Projecturf- This cloud-based task collaboration and productivity suite is used by thousands of companies worldwide to manage projects, collaborate with team members and clients, and most importantly to complete tasks and get things done! It allows you to organize and keep all of your project data in one place, notify others with instant email notifications. Designed to allow you to get tasks out of your head





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quickly and manage the details later. Even though Projecturf is powerful and holds plenty of data, getting things into it and from it totally easy. This lets you stay focused on the important things, like getting things done.

Base Camp- Gives you a single page projects giving you everything on one page so you and everyone else know where everything is. Base Camp features discussions, to-do lists, files, text documents. No matter how many projects you have going on at once; you can see everything and your projects can be archived online after completion. This platform allows everyone to collaborate and you have complete control over who sees what projects and you can create groups. The calendar feature makes it easy to see everyone's schedule in one place.

Time Trade- You might know this tool by its former name, Time Driver. It's an online appointment scheduling systems used to allow individuals to book appointments with you using an automated system.

Box.net-This tool is secure, works on any device and it scales to meet your needs whether you're a small operation or much larger one. Box.net lets you manage files, gives you mobile access and allows you to sync across all your devices. No matter what device you choose you get fast, easy access to documents, project plans, presentations and videos. It also allows for online collaboration so that you and your team can work together easily. You can invite others to share, comment and even create new content together with the Box Notes feature.

SaneBox- SaneBox helps you get rid of email overload. It separates your most important emails from the ones that can wait, helping you prioritize the way you read your messages and saving you time and frustration. It's not another email program;





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it's an application that works with your current email program, so there's nothing new to learn. SaneBox uses up to 5 levels of importance. You can use those levels to fine tune the flow of your email or you can allow the application to do it for you. The important stuff goes straight to your inbox and everything else gets stored in other folders for later.

CardMunch- Helps eliminate your stack of business cards. CardMunch is an app for iPhone, and coming soon for BlackBerry, that allows users to convert business cards to address book contacts. Take a quick photo of a business card upload it to the service and the information will be automatically added to your phone. Every business card you submit is transcribed, edited and reviewed by people to guarantee accuracy. View of all your business cards and flip through them and access your contacts' information. Your contacts are searchable by name, address, or even by notes and CardMunch indexes all your contacts' information.

Card Scan-This card scanner scans business cards right into your database or contact management system. Simply insert the card, scan the information, confirm and save it. Then get rid of the stack of cards. Card Scan makes it easy to get new contacts entered quickly so that you can work on other things.

Infusionsoft- Get organized, sell online, close sales and automate your marketing. Get organized, automate your marketing, sell online and close sales. This awesome tool lets you map out a custom campaign in seconds on your own or using one of their proven templates to get your next campaign up and running fast. Send emails, direct mail and voice broadcasts automatically based on date, time, or a behavior like a click or purchase. You can also use the visual campaign builder to automate all of your internal or external processes from new hire onboarding to purchase fulfillment.





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Evernote- Evernote can be used to store different types of content. Write yourself a note, save a portion of a web page or an email you've received that you want to remember and customize your notes. You can save pictures and whatever images you want to save. Everything is synchronized to Evernote on the web automatically and from that point are accessible from anywhere you've install Evernote – your laptop, tablet or your smart phone.

Additional Tools

As you review this list, check out the tools mentioned and explore them to see what fits for you. Technology is always evolving, so there may be new features to the tools you see here, and of course there are many other tools to explore. Identify other tools that might be a fit for you before you make your final choices. Remember to always review what you're using to see if it's time for something new that's a better fit for your needs. Use the space below to list other tools that you want to explore.

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Once you determine the tools and technology that are right for you, implement their use and be sure to give yourself time to walk through the necessary process and to get used to what you implement. If you find that you need help with implementation, hire someone to help you to make the process smooth. I provide systems design and implementation services if you are interested. Email me if you would like more information info@thirdeyegroup.net.

