

GET YOUR ACT! TOGETHER:

*Organizing Your
Professional Life To
Improve Productivity &
Win More Business*



***29th Midwest Facilitators' Conference
Friday, April 26, 2002***

Welcome

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Agenda

- Introductions and Overview
- Learning Points
 - What information to track and where to track it
 - How to organize a calendar and follow-up system
 - How you can organize your day so you can focus on what truly matters
 - How to use ACT! to improve follow up and win new business
- Wrap up Q & A

Introductions and Overview

E Tech Systems

Alan Lee - President

E Tech Systems

- Mission: Efficient use of technology
- Founded 1988
- Certified consultants
 - ACT!, SalesLogix, salesforce.com, Microsoft
- Focused on implementation
- Experts in computers, sales, & marketing

Getting Organized

*depends on
your goals*



An easy 5-step plan to get your ACT together

- Make a master plan, set goals
- Organize your paper, desk, tasks
- Use technology wisely (do backups)
- Set daily goals but start over each week
- Sharpen the saw... Improve a little each week!

To get organized

Problems to solve:

- Keeping Information Organized
 - Names/Numbers..., Tasks, Appointments
- Increase Communications
- Better record keeping
- Faster access to needed information
- Allow growth as conditions change

Four key decisions that effect what technology can help you

- Where to track information on people and companies
- How to organize your calendar
- How to easily produce and track e-mails, faxes, and reports
- When to move data between the PC and Palm or Web Phone

4 key tools

- **Cell Phone:** Voice and Data
- **Palm** is a PDA: personal digital assistant
- **ACT!** is the Best-Selling Contact Manager
- **Outlook** is the Best selling Email Client

Cell Phone

- Voice
- Data –Text Messages and Web
- Fax – send
- Email

Cell Phone

- Demo
- What's New
- Why bother



PDA's

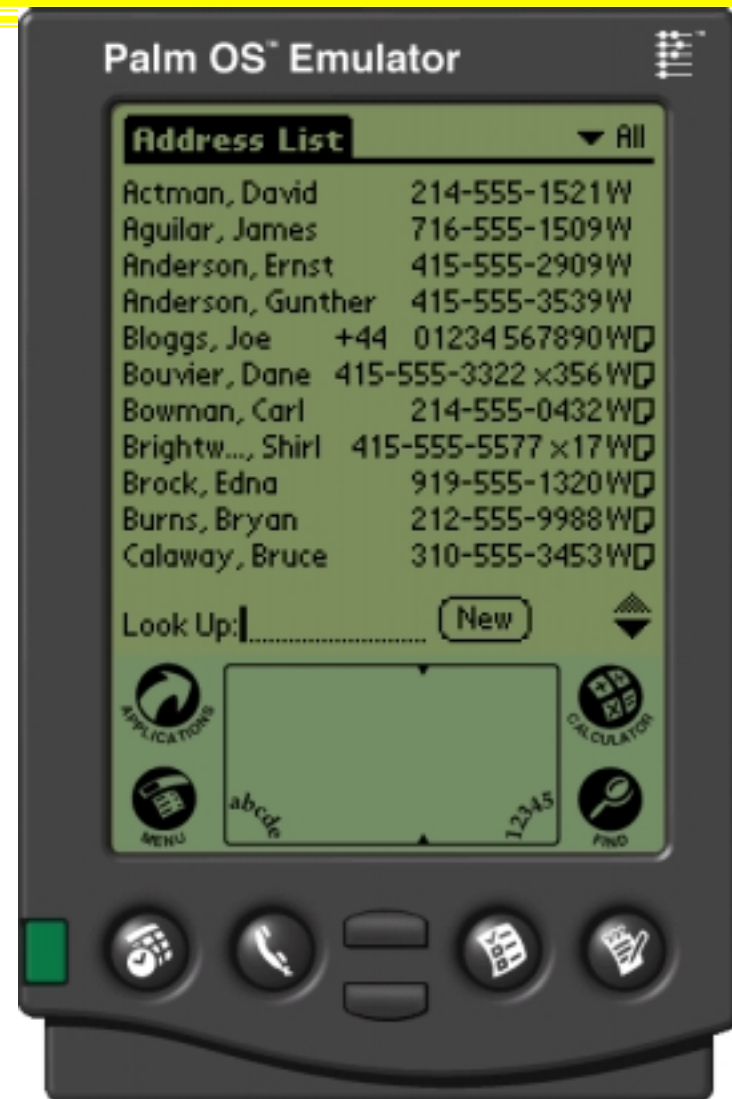
Personal Digital Assistants

- Address Book
- Calendar
- Tasks
- Email...
- Programmable

Palm PDAs

Personal Digital Assistants

- Demo
- What's New
- Why bother



Outlook

- Address Book
- Calendar
- Tasks
- Email
- PIM: Personal Information Manger

Outlook Shortcuts

Inbox

- Outlook Today
- Inbox (1)
- Calendar
- Contacts
- Tasks
- Notes
- Deleted Items

- Folder List
- Outlook Today - [Personal Folders]
 - Calendar
 - Contacts
 - Deleted Items
 - Drafts
 - Inbox (1)**
 - Journal
 - Notes
 - Outbox
 - Sent Items
 - Tasks

| From | Subject | Received |
|----------------------|---|------------------------------|
| sfm | Get the perfect mortgage fast. It's simple. | Wed 4/24/2002 4:07 PM |
| CRM-DECISION-MAKERS | ITtoolbox CRM-DECISION-MAKERS | Wed 4/24/2002 3:54 PM |
| CRM-DOERS | ITtoolbox CRM-DOERS | Wed 4/24/2002 3:47 PM |
| DeVry Offline | Alan, Boost your career with a DeVry University deg... | Wed 4/24/2002 3:38 PM |
| DeVry Offline | Alan, Boost your career with a DeVry Universi... | Wed 4/24/2002 3:38 PM |
| John Clark | Re: (More detail) Re: More on problems with OakExp... | Wed 4/24/2002 2:49 PM |
| Jim Statwick | Re: ACT sales / consulting | Wed 4/24/2002 2:37 PM |
| Alado | RE: Speech | Wed 4/24/2002 1:09 PM |
| Chuck Dietrich | Data Junction Training | Wed 4/24/2002 12:47 PM |
| Scott Spierling | Dear Alan, Look What You'll Be Able to Email to YOU... | Wed 4/24/2002 11:23 AM |

From: DeVry Offline **To:** ALEE@ETECHSYS.COM
Subject: Alan, Boost your career with a DeVry University degree **Cc:**

What do YOU want to accomplish?

Words from prospective students

College graduates **earn an average of 78% more income*** than non-college graduates.

"I want to provide more for my family"

"I need to set a better example for my children"

"I don't want to be stuck in a dead-end job anymore"

You can make it happen with a

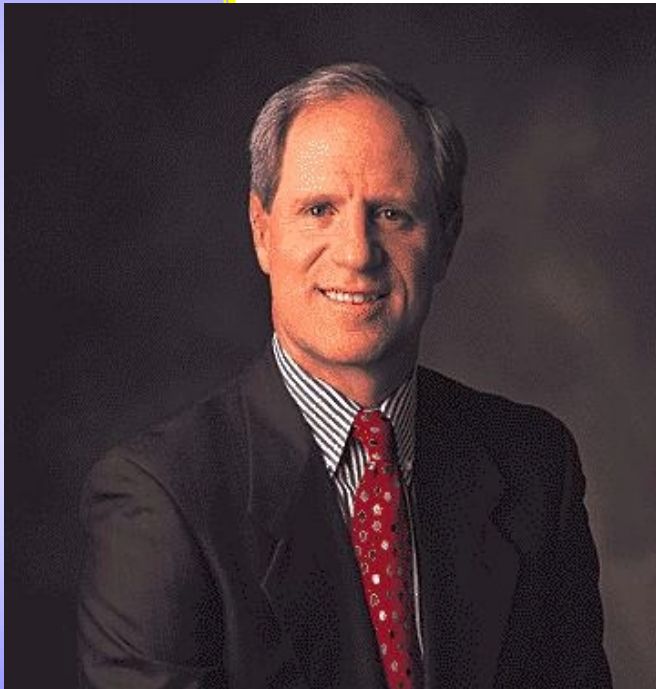
Contact Manger

ACT! 5 for Windows

1



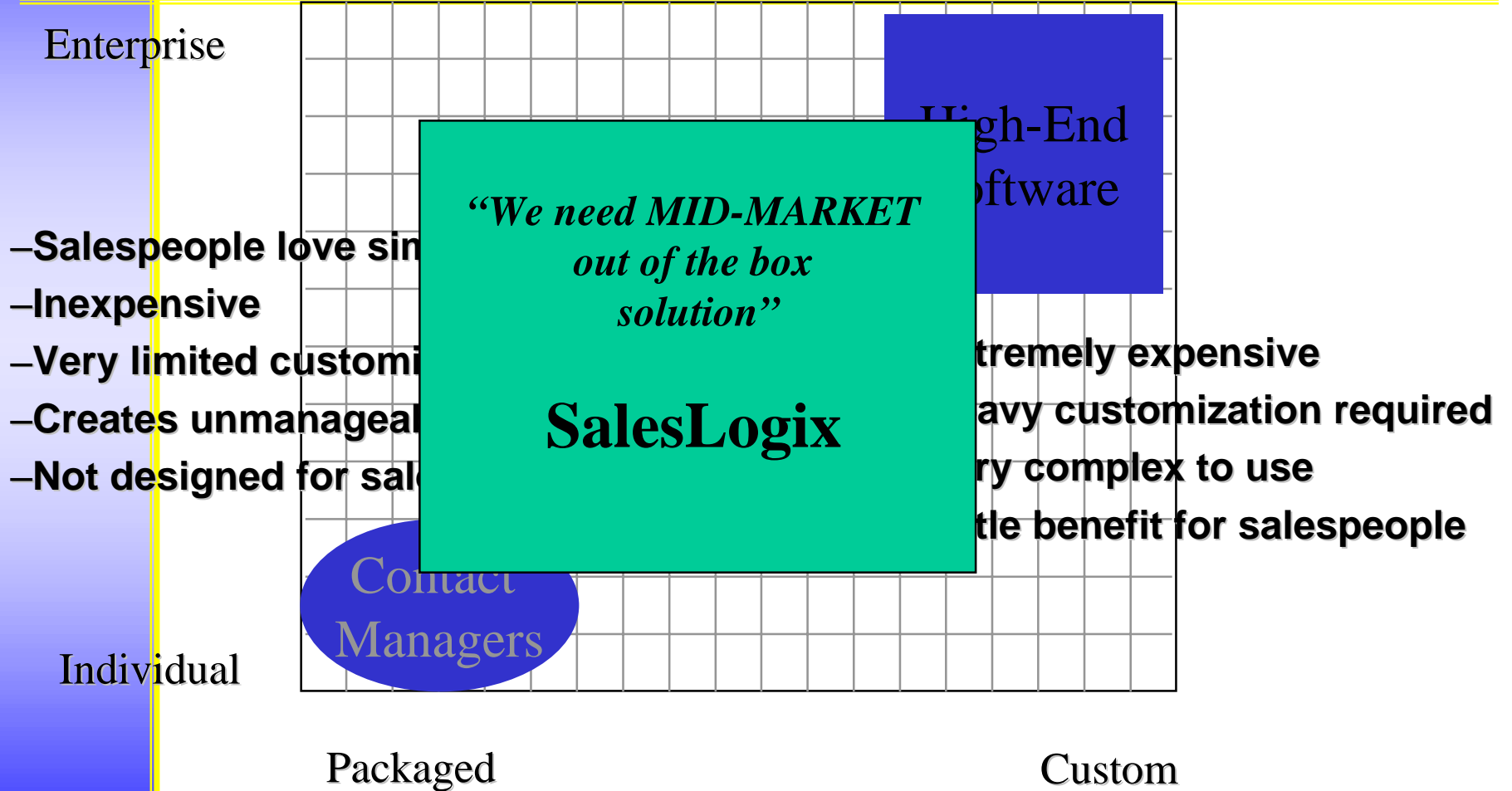
About Pat Sullivan...



- **Interact Commerce Corporation
President and CEO, part of SAGE**
- **Pat Sullivan was former co-founder,
CEO and president of Contact
Software International**
- **Pat was the original marketer and
developer of ACT![®]**
- **Contact Software is credited with
creating the contact management
software category.**

Existing CRM choices

Customer Relationship Management



What is ACT! ???

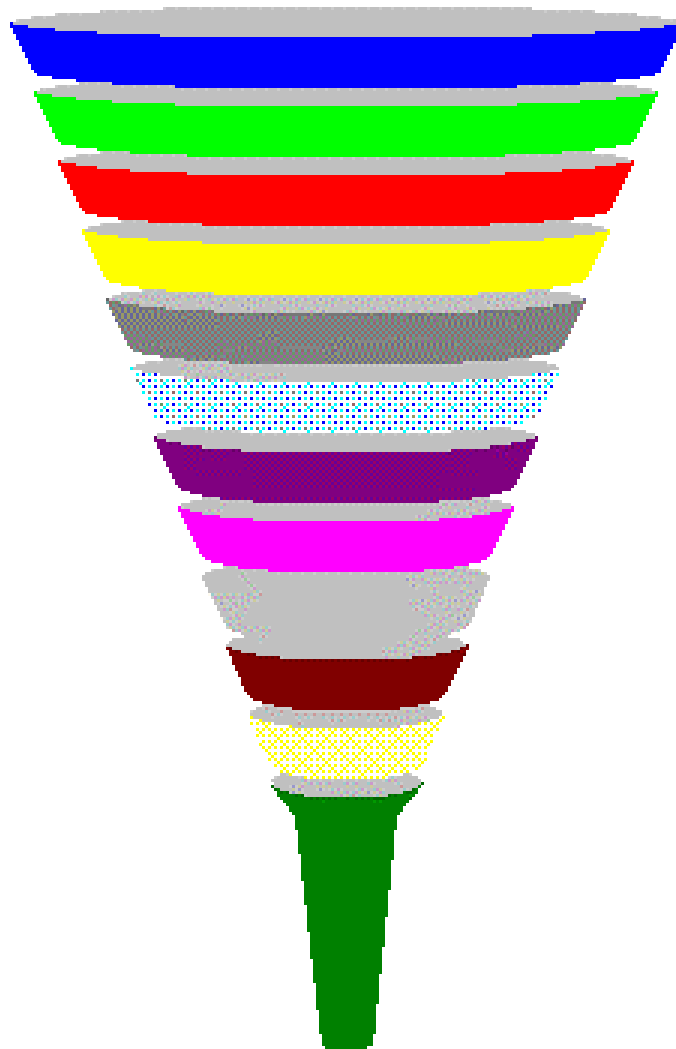
- A complete, integrated system to combine
 - Database
 - Word processing
 - Calendars
- Target is Sales People
- Written by sales people for sales people

- Contacts
- Contact List
- Groups
- Task List
- Daily Calendar
- Weekly Calendar
- Month

| | | | |
|----------------------|--|-----------------------|--|
| Company | E Tech Systems | Address | 927 F North Plum Grove Road |
| Contact | Alan Lee | | |
| Title | CEO | | |
| Department | Corporate | City | Schaumburg |
| Phone | 847-619-2000 | State | IL |
| Fax | | Zip | 60193 |
| Salutation | Alan | Country | United States |
| ID/Status | Supplier | E-mail Address | alee@etechsys.com |
| Ticker Symbol | | Last Results | |
| Web Site | www.etechsys.com | | |

| Filter <input type="checkbox"/> Notes <input checked="" type="checkbox"/> Histories <input checked="" type="checkbox"/> Attachments <input checked="" type="checkbox"/> E-mail <input type="checkbox"/> Insert Note Details... | | | | | | |
|---|----------|-----------------|----------------------------------|----------------|--|--|
| Date | Time | Type | Regarding | Record Manager | | |
| 11/17/99 | 11:32 AM | Field Changed | ID/Status - Supplier | Chris Huffman | | |
| 11/10/99 | 10:56 AM | Note | test note | Chris Huffman | | |
| 11/9/99 | 8:32 PM | Contact Deleted | Michael Wiggum - Trader Depot | Chris Huffman | | |
| 11/9/99 | 8:31 PM | Contact Deleted | Dr. Nelson Zoo - Univ of Chicago | Chris Huffman | | |

Sales Funnel 11/17/99



- 11 New Opportunity
- 3 Pre-Approach
- 2 Initial Communication
- 2 First Interview
- 3 Opportunity Analysis
- 3 Solution Development
- 1 Solution Presentation
- 0 Sample/Demo
- 1 Customer Evaluation
- 3 Negotiation
- 1 Commitment to Buy
- 1 Follow-up

Close

Options...

Save Funnel...

Copy Funnel

Print Funnel...

Help

ROI: Return on investment

- Do more with less effort
- Find information when you need it
- Follow-through on commitments within the promised time frame.
- Bottom line: you can build better business relationships and win more business!

Wrap-up

Question and Answer Time

Call us for more info...

847-619-2000

sales@etechsys.com

Thanks for coming!

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E Tech Systems, Inc.

TRAINING · SYSTEMS · CONSULTING

We Turn Leads Into Sales!

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