

Tools for Keeping Organized and Saving Time and Money

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Overview

- **Part 1. Money saving tools**
- **Part 2. Organizational tools**
- **Part 3. Delegation tools**

Part 1. Money saving tools

The following are some things that many businesses/professionals overspend on:

- phone
- legal documents
- business consultants
- office space

Let's analyze some of these to see if there are less expensive solutions.

Phone

- VoIP – make calls via internet connection for lower cost than traditional phone services
- Questions to ask yourself when you are considering which VoIP service to use:
 - Do I mainly use my phone in a single location or while mobile?
 - How many minutes do I typically use a month?
 - Are most of my calls within Canada or international?

Feature	MagicJack	Vonage	Skype
Usable with your computer off	No	Yes	Yes (if you have a Skype phone)
Usable with a normal analog phone	Yes	Yes	No (unless you have an adapter;
Voicemail	Yes, will record a .wav file if your computer is on; you can't call in for messages.	Yes	Yes (free with monthly plan, \$20/year otherwise)
Video chat	No	No	Yes
Send & receive SMS text messages	No	No	Yes
Keep your current land line phone number	No	Yes (usually)	No
Works with a dialup connection	Technically yes but dreadful quality	No	Yes, okay quality
Three way conference calling	Yes, but the 2 calls need to be inbound to you.	Yes	Yes (conference calls up to 9 people possible)
Automatic call forwarding (eg. to your cell phone)	No	Yes (free)	Yes (free with subscription)

Phone Cont'd

- Virtual PBX (evoice, Grasshopper, etc.) works as a smart phone number
- Start at about \$10/month (most include free trial) and includes such features as an auto attendant, multiple extensions, virtual fax, vanity or toll-free phone number, call transfer, and call recording.

Provider	Rating	Price	Lines	Included Minutes	Per Minute Rate	BBB Rating	Free Trial	No Setup Fee	Unlimited Extn's	Outbound Internet Fax	Conference Calling	Internat'l Numbers	Queuing	Answer'g Rules	
RingCentral Mobile	Editors: ★★★★★	\$8.29/mo	1	300	4.9¢	A+									
	Users: ★★★★★	\$16.29/mo	1	1,000	4.4¢										
	Users: ★★★★★	\$23.29/mo	1	Unlimited/1000	4.2¢										
	Users: ★★★★★	\$31.29/mo	1	Unlimited/Unlimited	n/c										
VirtualPBX	Editors: ★★★★★	\$9.99/mo	1	300	6.5¢	A									
	Users: ★★★★★	\$24.99/mo	1	600	5.8¢										
	Users: ★★★★★	\$44.99/mo	1	1,000	4.7¢										
	Users: ★★★★★	\$94.99/mo	1	2,500	4.4¢										
Phone.com	Editors: ★★★★★	\$9.88/mo	1	300	4.9¢	A									
	Users: ★★★★★	\$19.88/mo	2	600	4.9¢										
	Users: ★★★★★	\$34.88/mo	3	1,000	3.9¢										
	Users: ★★★★★	\$69.88/mo	3	2,500	3.5¢										
Nextiva Connect	Editors: ★★★★★	\$8.95/mo	1	100	4.5¢	A-									
	Users: ★★★★★	\$19.95/mo	1	500	4.5¢										
	Users: ★★★★★	\$69.95/mo	1	unlimited											
FreedomVoice	Editors: ★★★★★	\$9.95/mo	1	100	5.9¢	A									
	Users: ★★★★★	\$39.95/mo	1	1,000	4.9¢										
	Users: ★★★★★	\$79.95/mo	1	2,500	3.9¢										
Grasshopper	Editors: ★★★★★	\$9.95/mo	1	none	6¢	A+									
	Users: ★★★★★	\$24.00/mo	1	500	6¢										
	Users: ★★★★★	\$49.00/mo	2	2,000	6¢										
	Users: ★★★★★	\$199.00/mo	3	10,000	6¢										
Evoice	Editors: ★★★★★	\$12.95/mo	1	300	5.9¢	F									
	Users: ★★★★★	\$19.95/mo	1	500	4.9¢										
	Users: ★★★★★	\$29.95/mo	1	1,000	3.9¢										

Do a comparison at

www.VirtualPhoneSystemReviews.com/quick-compare/

Part 1 - Money saving tools

Legal Documents

- Incorporate online
(corpcanada.ca/corporationcentre.ca)
- You can incorporate your business federally throughout Canada for under \$550 (that includes the NUANS name search, minute book, corporate seal, common shares)

Legal Documents

- Standardized contracts & legal forms written by lawyers, consultants, and professionals
- Business-in-a-box (BizTree.com) for \$200 gives you access to many legal forms including HR, Real Estate, Contractors Agreements, Shareholders Agreements etc

Business Consultants

- Mentors instead of hiring consultants
 - Greater Charlottetown Area Chamber of Commerce
 - Greater Summerside Chamber of Commerce
 - Canadian Youth Business Foundation (if under 35)
 - On Your Own

Business Consultants

- When asking someone to be your mentor:
 - Do your homework on your mentor (know their experience)
 - Tell the person why you would value their advice
 - Don't rush into it. Offer to meet over a coffee to see if it is a good fit for both sides
 - Don't be sour if they don't accept. After all, it can be seen as a large commitment.
- Ground rules for a mentorship agreement
 - Have both parties sign a confidentiality agreement
 - Have an agenda for each meeting
 - Propose a default meeting time & place
 - Be respectful of their time
 - Offer a preliminary expiry date

Business Consultants

- Entrepreneur's Forum

(www.EntrepreneursForum.com)

- Free 1-3 hour session with advisory board of experienced business people in the fields of your choice

Office Space

- Co-working Spaces

- Queen Street Commons
- Launching in Montague & Summerside within a year

- Launchpad (www.LaunchpadPEI.com)

Part 2. Organizational tools

Professionals are increasingly mobile being on the road and working remotely. The following are some things that may be a challenge to keep organized when you aren't situated in one place:

- looking for documents
- setting up meetings with other busy people
- staying on top of "to do" lists, reminders, and calendars
- managing client info

Let's take a look at some online resources that can make organizing these simple and effective

Looking for Documents

- Save documents to Evernote or Dropbox and you save time and paper
- Keep everything in sync, access your documents from anywhere
- Both are inexpensive (offer free packages)

Setting Up Meetings

Doodle (www.doodle.com) is a free online tool for scheduling meetings.

Step 1: Suggest possible meeting times

Step 2: Send a link to whoever you want to invite

Step 3: View the results that show the time that works for most of the people you've invited

Project Management Software

Project management software helps you by supplying a central location for all info, tasks, calendar events, milestones, documents applicable to a client or project

If used properly, the end result is a clutter free process in getting things done

Project Management Software

On-Trak – easy to use software made by Timeless Technologies in Charlottetown

Features: track time per task, manage client info, add calendar events and reminders, email notifications when someone updates a project, clients can use the software, and more.

Pricing:

Single User	\$69 Per Month
5 Users	\$199 Per Month
10 Users	\$299 Per Month
11 + Unlimited Users	\$349 Per Month

* Taxes not included

Part 2 - Organizational tools

Project Management Software

Basecamp – more complex project management software with more features

Features: all the features that On-Trak has, plus: syncs with Google Calendar & Outlook, emails can be sent & replied to via Basecamp (more mobile friendly), and more. www.BasecampHQ.com

Free trial available. Plans range from free to \$150/month

Customer Relations Managers

CRM's help to organize sales leads, current clients, and other contacts. Many CRM's include notifications for follow-ups.

www.crm-compare.com

Highrise syncs with Basecamp

Part 3. Delegation tools

Everyone can use a lending hand, but hiring can be time consuming and expensive. Here are some other ways for finding the help you need:

- virtual assistants
- outsourcing to freelancers
- crowdsourcing
- help with social media

Virtual Assistants (VA's)

Virtual assistants are contracted workers that can perform any tasks that can be done remotely

VA's are all over the world. India offers a pricing advantage (normally \$5-\$15/hour)

Pay by the task/project or hire part-time to full-time

Virtual Assistants (VA's)

North America-

International Association of Virtual
Office Assistants - www.iavoa.com

India –

www.tryasksunday.com

www.b2kcorp.com

www.yourmaninindia.com

Outsourcing to freelancers

Elance.com – charges the freelancer up to 8.75% of project cost

Freelancer.com – charges the business 3% of project cost upon completion

How it works - 5 easy steps



1. Post your project in seconds



2. Compare prices & select bidders



3. Create payment for the project



4. Approve completed project



5. Release payment to the freelancer

Crowdsourcing

Crowdsourcing offers various different perspectives on a creative project. Great to use when you are brainstorming or unsure of what you exactly want

CrowdSpring.com, 99Designs.com,
Squadhelp.com

Help with Social Media

Social Media Ghostwriters for help with strategy and implementation

Hire a consultant on a monthly basis that is doing the research anyways

Conclusion

The business world and workplace is evolving to become more efficient and less expensive. Today's presentation just scratched the surface of many of the things we can now do.

I will be doing a longer version of this presentation on October 4th at the Charlottetown Chamber of Commerce boardroom. Please spread the word around to others that you feel could benefit from the presentation.

All of this content can be found on my blog at www.WebPresenceNetwork.ca