

# Building A Technology Toolkit™

## Part 2

*Kip Gregory, Principal, The Gregory Group*

*Part One of this series identified a group of communication, strategic thinking and marketing tools that you, as an independent brokerage general agent and entrepreneur, can leverage to improve the efficiency and effectiveness of your agency. It also outlined five steps to follow in making decisions about what and how to automate.*

This installment will identify several other categories of tools for building an agency that makes smart use of technology to increase its franchise value. “Franchise value” is the worth of your business to a potential buyer of your firm. Yes, it includes the value of a renewal book, but it’s also the marketing, sales and administrative processes and systems that you’ve established to ensure the agency’s success and survival after you’re gone. This is an important consideration in the current industry environment of mergers and acquisitions.

Used properly, technology is a great tool for increasing franchise value. Smart business systems that leverage technology enable you and your staff to focus more time on what matters most: developing satisfied customers and cutting your application processing costs.

When talking technology, it helps to have good sources to keep on top of and help sort through the mountain of information about what’s available and what to use; at the end of this article you’ll find two terrific Internet “Information Wells” to help do just that. A few tools to help you successfully manage the variety of relationships through client profiling, grouping, mass mailing, scheduling and reporting are...

### **ACT! or Goldmine & ACT! Pak!**

The first two products are contact management software programs that house client and prospect information in a database. Point your browser to [www.symantec.com/act/](http://www.symantec.com/act/) for ACT! and [www.goldminesw.com/](http://www.goldminesw.com/) for Goldmine. Both products are in their fourth generation release (4.0). ACT! Pak! is an add-on product useful with ACT! for a variety of tasks including automatically scheduling a sequence of client related activities (follow up letters, phone calls, meetings, etc.) according to a calendar you set. Visit [www.oakhurst.com/](http://www.oakhurst.com/) for more information about ACT! Pak! and other products for ACT! and Goldmine users. It’s worth investigating.

### **Outlook.**

Outlook is a very good email program that offers contact management capabilities and tight integration with the rest of Microsoft’s Office 97 programs (Word, Excel, Access and PowerPoint). It doesn’t offer as many features as ACT or Goldmine, but it’s a

Microsoft product, so you can count on it gaining in popularity over time. Even if you only use it for its email capabilities, you'll find it valuable. Check it out at [www.microsoft.com/outlook/](http://www.microsoft.com/outlook/).

**Productivity** is one of those vital yet hidden differences between being a good company and being a great company. Check out these tools to help you automate repetitive tasks, dictate to your computer, better manage files on your PC, browse the Web without the wait...

### **Macro Express.**

If you could only use one of tools included in this list, I would strongly recommend you consider Macro Express. It is a macro recorder program. Macros are sets of keystroke or mouse click commands that can be played back at will to perform any series of often-used steps, eliminating the need to execute each step manually. For example, macros can be used to launch a program, copy data from it, activate another program, and paste the data into it – repeatedly, if you wish. Ask your new business and policy-owner service people to describe the manual steps they perform on their computers over and over to process business, the same way every time, and you'll probably get a long list of potential uses for Macro Express. You'll find it at [www.wintools.com](http://www.wintools.com).

### **NaturallySpeaking Preferred or Professional.**

This is the leading voice recognition software available today. I guarantee you will be amazed the first time you dictate notes or a letter directly into your PC. It requires some initial training (roughly 45 - 60 minutes), but after that, it learns your speaking style as you use it. It's like putting a full-time typist on staff for several hundred dollars. The new Professional version allows you to dictate into a handheld device and plug that device directly into your computer later for unattended transcription. Visit [www.dragonsys.com/](http://www.dragonsys.com/).

### **Quick View Plus.**

If you run Windows 95, open up its file manager, Windows Explorer. Right click on a file and you'll probably see "Quick View" near the top of the pop-up menu. Quick View allows you to view the contents of a select group of file types without having to launch the program and open the file. Quick View Plus is a more complete version of Quick View, that expands the number of "readable" file types from several dozen to several hundred. You can read more information or download it at [www.inso.com](http://www.inso.com).

### **WinZip**

This is a terrific file-compression utility program. Most of the files that you work with on your computer use far more storage space than they actually require. WinZip and other compression tools squeeze the "wasted" space of a file (or multiple files) to reduce the amount of storage it requires on your hard drive (or on a floppy), and gives the file a ".zip" extension. It's very useful for archiving information you don't need regularly but need to keep, or to reduce the size and time of transferring files to others. You can buy and download WinZip from [www.winzip.com](http://www.winzip.com).

### **MS Internet Explorer 4.01 (Service Pack 1).**

This latest version of Microsoft's web browser has a bunch of timesaving features built in. Check out the Subscription function, which allows you to download web pages from select web sites, without waiting for the screen to fill in. It does for web browsing what OzWin does for CompuServe, minimizing the amount of time you have to spend on-line to get the information you want. [www.microsoft.com/ie/ie40/](http://www.microsoft.com/ie/ie40/).

### **Webferret.**

Like Macro Express, Quick View Plus and WinZip, Webferret is another extremely useful utility. Webferret is modeled after the Windows Explorer file manager, and allows you to search the Internet fast for information you seek. You type the word or phrase you're searching for, click on the "Find Now" button, and Webferret begins a simultaneous scan across more than 15 search engines. It builds a list of all sites that match your search criteria, including the name of the Web page found, its Web address, the relevance to your search criteria (% match) and source (search engine where the information was found) listed in columns for each item. You can then sort the information on any one of those columns. You can ask it to find all the sites that include a specific phrase and it will instantly highlight those that do. And you can save your search results for later use. It's a very powerful tool for reducing the time it takes to find what you're looking for on the 'net. Go to [www.ferretsoft.com](http://www.ferretsoft.com).

### **WebWhacker & Grab-A-Site.**

If you've ever wanted to download an entire Web site for use off line (maybe to include carrier Website information in a broker or client presentation), but had to spend hours waiting for the pages to transmit, relax. There are products that will let you designate an entire Website, part of it, or just one page, then download those pages and save them to your hard drive (or zip disk), to whatever location you choose. You don't have to search through a cache file later to find them. Instead, you click on the page you want from a file cabinet listing within either program. Best of all, you can click through each of the pages without waiting for them to transmit through your modem. A great presentation, competitive research or technical support tool. Check them out at [www.bluesquirrel.com](http://www.bluesquirrel.com).

### **CompuServe & OzWin II.**

Last year, America OnLine purchased CompuServe from H&R Block. Hopefully, they recognize the tremendous potential CompuServe offers as the leading on-line tool for small business owners. There is no better single source of information on subjects of interest to your clients and strategic partners, business management issues, hard and software technical support and almost any other topic you can imagine. Most of the information "gems" are found within CompuServe's 600+ forums, which cover a wide variety of subjects (you get to a forum by typing its "GO" word once you connect). You can find it at [www.compuserve.com/](http://www.compuserve.com/).

OzWin is an off-line reader (OLR) that will minimize your time online by automating your data requests and delivery, using "scripts." Before going online, you tell your PC what information you want it to send and retrieve. Then, it does the work, while you do something else. You can download messages and library catalogs without hovering over your PC. Your time isn't wasted waiting for connections to be made, screens to be "built"

or traffic to clear. Also, you don't fall prey to "browser drift." Within CompuServe, GO OZWIN to download a 30-day trial version.

### **Information Wells.**

Last, but definitely not least, are the places you can go to learn what's the latest and greatest software, developing trends in high-tech or even to take a computer class on line.

### **ZDNet.**

If I were going to bookmark one page among the millions on the Internet to keep track of changing technology and how it affects my business, it would be [www.zdnet.com/](http://www.zdnet.com/). ZD stands for Ziff Davis, the publishers of PC Magazine, PC Computing and other popular trade journals. Caution: be careful, you can spend hours here! The area I find most useful is ZDNet's software library, where you can find virtually any leading piece of software marketed on the Internet available for download: PC utilities (to improve performance), spreadsheet and word processor add-ons, Internet tools, you name it. See for yourself at [www.zdnet.com/swlib/](http://www.zdnet.com/swlib/).

### **Cnet.**

Cnet makes a great companion to ZDNet. It's another place where you can learn about software that can rid of some of redundant tasks you've always done manually because you never knew a program existed to automate what you do. Visit [www.cnet.com/](http://www.cnet.com/). While you're there, bookmark two areas of the site, [www.download.com/](http://www.download.com/) and [www.shareware.com/](http://www.shareware.com/).

### **Bonus Web sites.**

Though these sites weren't included in my workshop slides in Boca Raton, they are worth checking out:

**PC Connection** offers a wide variety of software and hardware at competitive prices, and you can call them until 2:30 am and still receive your order that same day. Wouldn't it be nice to issue policies that fast! You'll find their catalog at [www.pconnection.com](http://www.pconnection.com). You can also call them at 800.800.5555 to speak to someone directly.

**8005 Quotes, Toasts and Speeches.** This is another product from ModelOffice. If you regularly write a newsletter, or struggle with what to include in your quarterly statement cover letters, you may find some useful ideas within this program. Again, point your browser to [www.modeloffice.com/](http://www.modeloffice.com/) for samples.

**MS Office 97.** Together with a good contact management database, office suites like Microsoft's Office 97 represent the backbone of your business. For example, it's possible (and easy) to merge your contact data directly into letters and presentations in Word, Excel and save yourself from needlessly repetitive data entry. Visit [www.microsoft.com/office/](http://www.microsoft.com/office/) and go from there to information about all of its products: Word, Excel, PowerPoint, Access, and Outlook, among others. While you're there, check out the add-on products available for download, for example animated PowerPoint templates to perk up your presentations.

**Amazon.com.** Additionally, if you're interested in the recommended readings included in the presentation handouts and mentioned at the beginning of the session, I've included those, too. All are available for at least a 20% discount through Amazon.com at

www.amazon.com/.

***NAILBAnote:** this article is the second of a two-part series adapted from a NAILBA XVII workshop presentation delivered by the author, Smart From the Start: Making Technology Work For You. Part One appeared in the Winter issue of the NAILBA Magazine. You may reach The Gregory Group at (202) 364-6913 or by [email:kipgregory@email.msn.com](mailto:kipgregory@email.msn.com).*