Information Overload

by Scott Shelley

When I first started out as a one-man remodeling business, I was able to keep track of all my appointments, contacts, and other job-related information in my head and with a simple notepad. As my business continued to grow, my notepad grew with it, but my head stayed the same. I can vividly recall the sickening feeling I had the day I missed my first appointment with a potential client because my notepad/head system of organizing failed. Even worse was having to sort through stacks of paper looking for the note I had written about a client's tile selection or a price quote from a sub.

The Answer

I solved my information overload problem when I first started using Windows on my computer. I was anxious to try out my new Windows operating system with an actual Windows application, but I didn't want to spend a lot of money on a "new" program that I might end up discarding later. What I found was a program called 1stAct, a scaled back version of ACT 3.0 for Windows, the information manager I now use. ACT and other contact management software, such as Sidekick, ECCO, Goldmine, and Ascend97, are simply databases that can store a variety of information about clients, meetings, to-do items, and so on. Most of these software packages will also work with other programs, such as Microsoft Exchange or WinFax, to send and receive e-mail and faxes. Some also include a word processor that's more than adequate for everyday correspondence and contracts.

Loading Up

The first thing I did with ACT was design two templates with my company letterhead on them, one for letters and one for envelopes (see Figure 1). This reduced the cost of having these items printed, and also helped to put some consistency into the way I presented my company.

Next, I tackled the most daunting part of this conversion from notepad/head to computer: entering all of my previous contacts. It took about four hours, but once it was done everything started falling into place. Here's how my system works now.

Sorting

I do most of my work while sitting at my desk, and my computer is always on. I have put ACT into my StartUp folder, so it's always present on my Windows 95 task bar when I boot up. When I receive a call from a potential client, new architect or designer, I immediately put ACT into action. First, I ask for the information I need to fill out the basic ACT fields: Name, Address, Phone number, and so on (Figure 2). ACT also has a field called ID/Status, which I use for "tags" such as "Client," "Prospect," or "Architect." The magic of these tags is that I can use them to filter or sort the entire database of contacts. For example, if I wanted to write a letter to all of the architects in my database, I could sort using the "Architect" tag. Once I have created the form letter that I want to send, I can merge all of the architects' addresses into the letter and
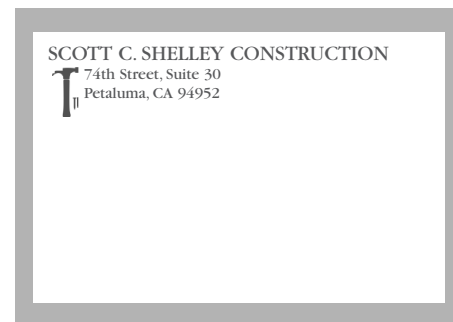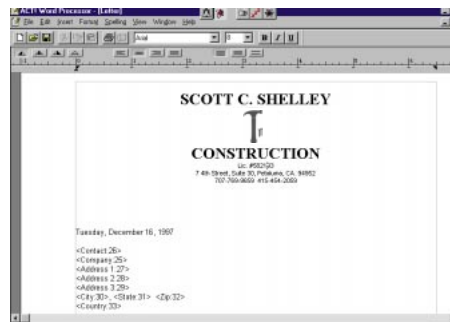
Figure 1. The author uses templates and his office printer to produce letterhead (left) and envelopes bearing his company logo.
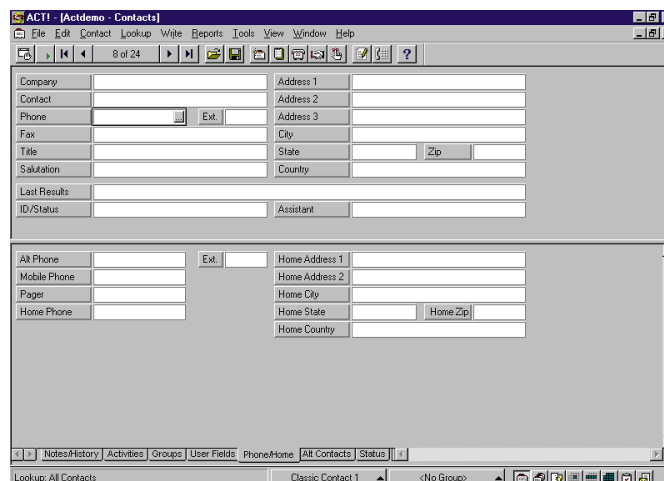

Figure 2. In addition to ACT data fields that hold basic information, such as name, address, and phone, the author uses the ID/Status field data fields to categorize his contacts by type — client, architect, supplier, sub, and so on. He can then use this field to sort the database to display contacts of the type he specifies.

Figure 3. Standard ACT reports include a phone list and a task list, which can be formatted to fit a paper planner, such as Day-Timer or Day-Runner, or can link with hand-held electronic organizers, like the PalmPilot.

envelope templates, print them, and I am done. Alternatively, if I want to send the letter only to architects in a particular city or zip code, I can add that criterion to the sort.

Remind Me

With ACT, all of my contact information is at my fingertips. If architect Fred Straightline calls me to set up an appointment, for instance, I look up his contact and schedule the appointment. (With caller ID and the right modem, ACT will automatically display any contact who is already entered in my database.) If my client, Susan Johnson, calls because the sink that her decorator ordered from Austria is 12 weeks behind schedule, I open her contact and add a note about the phone call. Later, when her 10-week bathroom remodel takes 22 weeks, I will be able to refresh her memory about who caused the delay. Alternatively, if I want to remind myself to call someone, send out a billing, write a contract, or take a tool in for repairs, I can do it all in ACT.

Contracts and Correspondence

Document templates make it easy to write a letter, but ACT goes one better by keeping track of all my correspondence. After I've printed a letter or sent a fax, ACT gives me the opportunity to attach an explanatory note. This note is stored with the "history" of the contact to whom I sent the correspondence. This feature can come in handy when a client tells me, for example, that she had no idea that she was supposed to remove all of her furniture from the rooms I am going to remodel. I can look up her record and tell her that I sent a letter about the furniture on a specific date.

I have also created a contract template that I use for small jobs. Using ACT, I can automatically merge all of the client information into the contract, which saves a lot of typing.

Take It With You

Because most contractors don't take their computer with them into the field, even if they use a laptop, software like ACT makes it easy to take the information you need with you. For example, you can print out a report showing all of the phone numbers for your contacts, a To-Do list, or a report showing the meetings that you have scheduled for the week (Figure 3). Most electronic information management programs will also print in a format that fits in a Day-Timer, Day-Runner, or Avery Organizer. In addition, the information in ACT and similar programs can be shared with a palmtop computer, such as the Sharp Organizer or PalmPilot (see "Computer Solutions," 2/98). Palmtops are especially useful, because they eliminate the paper and ensure that the information you have with you in the field is linked directly with the information in your computer.

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