

# KEEP IN TOUCH

Take control of business data with personal information managers.

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**W**hen you finally get a little time at your desk, are you productive? If information is all over the place, in separate billing files, mailing lists, e-mail folders and separate files for clients, coaches and students, it can be hard to focus on the big picture.

Last year we wrote about PDAs—personal digital assistants—and smart phones that let you take basic contact information everywhere. They're handy and portable, but there are better tools for the larger-scale, complete management of business contacts and tasks. If you need a business tool to track customers, coaches, events and projects, a database program offers the most flexibility. Here are a few tools that do the heavy lifting for you.

## DATABASE CHOICES

With a business database, you can store all important information in one program. Top database choices include Act! Contact Manager, FileMaker Pro, Microsoft Access and InfoSelect from Micro Logic.

Here are a few ideas for how you might use such a robust program:

- **CHOREOGRAPHY:** A folder showing all the events you participate in and all of your teams, detailing the choreography for each.
- **SCHEDULES:** A folder for all due dates leading up to a competition, planning staff member roles, uniform orders, transportation arrangements and parental consent forms.
- **MARKETING:** A master annual marketing plan showing costs and due dates for ad placement, mailers and community events.
- **ASSET TRACKING:** Manage all business assets, with an inventory of gym equipment, audio/visual recording equipment and other property.

Databases are gifted children compared to flat-file documents, such as reports created in word-processing programs. With powerful search capabilities in a database, you don't have to worry about finding information bits—just search for "uniforms," for example, and you'll find tasks, budget items and vendor information all in one program.

## INFOSELECT

InfoSelect uses a screen divided in two, with

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subjects down the left column and copious details on the right for each task, idea or project. It contains a word processor, calendar, to-do system and a "tickler" system to remind you of upcoming deadlines. It supports e-mail service but does not integrate with Outlook or work in a multiuser e-mail mode. Instead, your e-mail can be filed and stored where you want it, in specific project folders, not just a gigantic inbox.

### MICROSOFT EXCEL

If you don't want to invest a lot in software or build databases, remember that Excel is included in the Microsoft Office suite you might already own, and does a good job of organizing data in rows and columns. Excel has two advantages if you're just starting out:

1. **The data is easily converted to almost any other file type, so you can export it to a future database.**
2. **Advanced features of Excel allow you to do easy data entry, but sort and filter like a traditional database. You can even do complex "cut and paste" operations, such as transposing rows and columns.**

For more robust databases though, look to the big guys: FileMaker Pro, Act! or Microsoft Access.

### FILEMAKER PRO

FileMaker Pro, long a favorite of Mac users, has been around for over 20 years, and represents an all-in-one database solution. The newest version has improved templates for you to build your own databases and an easy way to import and export information with Excel.

Work your way through a few tutorials with FileMaker Pro, and you can create an invoicing system, reports, mailing labels and even email marketing. You can begin by using over 30 starter templates.

### ACT!

Act is a contact manager, which tracks relationships with customers, like FileMaker Pro. Invented by a salesman, Act shines at helping you follow up: remember to contact families about enrollment, track overdue payments, do a quick mail merge and print labels for postcard mailings. Fields can be customized, and any field can be captured in quick reports. It has a robust calendar, linked to contacts in the database, and works right out of the box. It's the easiest program for basic data tracking.

### OUTLOOK

We know Microsoft is the dominant vendor for software, and its offerings for data management are among the most powerful. From the new OneNote to a powerful Access database, there's a useful tool for you somewhere in the Microsoft family. If you have Microsoft Office 2003, you may have one or more of these programs already.

Outlook is likely the most familiar, with the integration of e-mail, contacts and to-do lists, but as a stand-alone product, it doesn't allow the customization or smart reporting of true database programs. And it doesn't generate reports, which is a big feature in Act.

### ACCESS

To make a truly custom database to suit all your needs, look to Microsoft Access.

As a relational database, Access takes some training to get started. Data is stored in tables, and relationships among tables create important links to allow you to look

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at the same data in different ways. It also takes some skill to learn to design screens and reports. If your database needs something more than an off-the-shelf solution, consider Access, and perhaps test drive it with a few pre-built templates.

#### ONENOTE

The problem with data management is we often keep some information in e-mail, some in Word, some on a paper calendar or bookmarked websites, saved in folders, or all in a big My Documents nest. For this, Microsoft has come up


with a pretty good solution.

OneNote collects and stores random bits of data in a hierarchical format—hopefully resembling the logical way you work. Pages hold text, meeting notes, passages pasted from the web and email, and sub-pages, drilling down to every step you need to take to get to Nationals. Each project becomes a tab across the top of the OneNote screen, and each page, task or idea within a project becomes a tab down the side of the screen. Since everything is visible, you're unlikely to forget tasks.

OneNote has the familiar Microsoft style, and

integrates with Office, so it requires no training, and any staffer or coach can jump in and intuitively find the information they need for their role in a project.

The thing about mastering such details is the more you do it, the easier it becomes, and the better you'll sleep at night, knowing everything is tracked in one place.

If your business suffers from chronic disorder, one of these solutions can help. Migrating toward a database doesn't happen overnight, but every step away from paper is less mess and panic when you're looking for something critical. 

## CAN YOU ANSWER THESE QUESTIONS FOR YOUR BUSINESS?

How many families re-enrolled their children this year?

How many families have siblings who could be enrolled?

Where do our referrals come from?

Is enrollment up or down from last year?

How well are we marketing to families who move into the area?

If you need help managing this information, consider these top vendors for information management solutions.

#### ACT! CONTACT MANAGER V. 2006

Vendor: Sage Software

Website: act.com

Platform: PC only

Estimated Retail Price: \$229.99

#### FILEMAKER PRO V. 8

Vendor: FileMaker, Inc.

Website: filemaker.com

Platform: Mac & PC

Estimated Retail Price: \$299

#### INFOSELECT V. 8

Vendor: Micro Logic

Website: miclog.com

Platform: PC only

Estimated Retail Price: \$249.95

#### MICROSOFT ACCESS 2003

Vendor: Microsoft

Website: microsoft.com/access

Platform: Mac & PC

Estimated Retail Price: \$229

#### MICROSOFT EXCEL 2003

Vendor: Microsoft

Website: microsoft.com/excel

Platform: Mac & PC

Estimated Retail Price: \$229

#### MICROSOFT ONENOTE 2003

Vendor: Microsoft

Website: microsoft.com/onenote

Platform: PC only

Estimated Retail Price: \$99.95

#### MICROSOFT OUTLOOK 2003

Vendor: Microsoft

Website: microsoft.com/outlook

Platform: Mac & PC

Estimated Retail Price: \$109



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