



## The Internet at Work

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### The Internet at Work

The past year has been one of some transition for Newfangled. We've moved offices, moved employees, changed phone and network providers, and implemented new administrative software systems. After a year of trial and error searching for flexible and affordable business infrastructure tools, we've discovered a few that have really been great. These internet based systems have allowed us to keep our company running smoothly - no matter where any of us might be on any given day.

This month's newsletter will review some of the best systems we've adopted. If you run a small business, you might want to check some of these out.

A year ago Newfangled decided to open a North Carolina office. We already had one employee in NC, but our decision to move half of us there created infrastructure challenges that had the potential to disrupt daily operations. Simple things like sending and receiving faxes while we were away from the office became problematic. Other factors like access to email, our phone system, and tracking important administrative information like sales pipeline, cash flow, invoices, and project status all involved important details that could have easily fallen between the cracks as we became less centralized during transition.

Fortunately, we discovered a handful of small business solutions that kept things flowing while we moved households, worked from hotel rooms or home offices, and set ourselves up in new locations. Most of these business tools have one a common denominator - they're internet based.

#### Online Communications Tools:

Most of the tools that helped us make our transition related to communications. Having some of us in NC, some at home, and others in RI, and the added complexity that our locations were changing from week to week made getting through to the people we needed when we needed them... tricky. And if it was tricky for us, what about when our clients needed to reach us?

**Verizon Wireless/BlackBerry** - Competition in the wireless industry is heated. I'm well aware as I write this that changes telecommunications could make this writing obsolete before I even deliver it. I also recognize that, with regard to cell phone coverage, location changes everything. At the moment, Verizon Wireless has by far had the widest and most dependable access for our company. I live out in the country in Chapel Hill. Throughout the past year we've tried T-Mobile, Sprint, and Cingular. None of them could give dependable coverage. But I get Verizon coverage everywhere I go, in the city and way out in the country. I also like the fact that whenever I call one of my employees on Verizon's network, we don't pay any long distance or use up our minutes. But like I said, these things change so I won't raise the Verizon Wireless flag too high. What I do love, though, is my BlackBerry. I admit it's kind of clunky - it's like the Volvo of cell phones. "They're boxy, but they're good." I've tried other phone and phone/PDA solutions for getting my email on the road. But as far as accessing and sending email while out of the office - nothing beats the BlackBerry. On top of that, Google just released Google Maps for the BlackBerry. I can now scroll and zoom in on real time maps from my phone. All the local search info works just like maps.google.com so I can look-up stores and services just like on the web version. This I like.

#### PBX Recommendations: VirtualPBX

**VirtualPBX** - Remember the days when you could give a simple answer the question, "what's your number?" Not so easy anymore. Whenever I'm asked this question now I run through a mental checklist - when might this person call me, should I use my cell number,

VoIP, or land line? Too many numbers! And they change too often. Multiply that by a handful of employees each with multiple numbers and soon a simple employee contact list starts looking like an accountant's ledger. PBX systems (**P**ri**v**ate **B**ranch **E**xchange - private voice mail and phone extension management systems) are designed to simplify contact information and allow employees to check messages remotely. Unfortunately most of these systems involve the use of physical hardware connected to physical telephone lines or T-1 lines. Configuring these systems, adding extensions, etc. is usually a pain in the neck. They aren't cheap either. Sometimes they also require specialized (pricy) phones to go along with them.

I ditched ours last year (sadly, still paying for it). We now use VirtualPBX. We have an (800) number but they also provide local numbers. In essence they convert each of our calls into a toll free (800) call and then direct the call to our extensions which we can point to any phone we want. This has been perfect for us because we can log in to our individual extensions and change our main number anytime we want. If I'm going to be in the office, I leave it set to my default land line. If I'm on the road I change it to my cell number. If I'll be using both I can create a follow me rule that rings the office, and if I am not there to pick up my office phone, it rings my cell. VirtualPBX system does charge a per minute usage fee since the toll free call, while free for you, is not for me. But the flexibility, ease of use, and zero equipment cost makes up for it. Another cool feature of this system is all voice mail messages can be assigned to email addresses. If you leave us a message we get it in our email inbox.

## Online Office Tools

**eFax** - We don't do a ton of faxing but it's one of those tools that, when you need it, you can't do without it. I didn't want to have to put a physical fax machine in every location where an employee might need to send or receive a fax. eFax has a great interface and allows us to send and receive faxes over the internet. In essence, eFax receives our faxes then emails us the fax file to us. We view it in their software and can "fax" it back digitally. It has text annotation tools and digital stamps for signatures. Of course, as an internet based tool, we can send and receive faxes through a web based client too.

**Skype** - Have you heard about Skype? Skype is an internet based phone network. And it's FREE! Download the Skype software - you'll need a headset with microphone for your computer. Get a free Skype account and you can now talk to anyone - anywhere in the world, for as long as you want, for free. Did I mention it was free? Come on - you gotta give the internet some props for that! There is a revenue model for Skype. They charge to enable Skype users to talk with non-Skype users over the internet. It's called Skype In and Skype Out. So, for example, if you pay for a Skype In account (I think it is about \$10/year), you get assigned a regular phone number. When someone using a standard phone dials your Skype In number it rings you on your computer. Again, the call is free. If you want to dial from Skype to a non-Skype user you can purchase Skype Out. You dial a normal phone from Skype and it connects you to their regular phone number. And it works! Some of you may have had contact with Chris Butler. He's our design/developer who works primarily with our SelectEdit clients. For the past year he's been in Malaysia with his wife who is teaching English there. If you dial his extension, VirtualPBX forwards the call to his Skype In number. When he picks up he is talking to you from Malaysia over his computer. No kidding. How cool is that!

**GoogleTalk** - I guess instant messaging is old news, so the fact that Google has an IM service now is no big deal. So does Skype, by the way. GoogleTalk has Skype-like calling features, too. I'm not the biggest fan of IM, but I admit it comes in handy. One reason I don't like IM is that it gives away my horrible spelling skills. My word processor overcomes my typos with little red squiggles (by the way, apparently "squiggles" is not the proper way to spell that word). Aside from the constant humbling spelling mistakes, I am also not very fond of getting beeped all day. Nevertheless, I use it because it is absolutely the best way to get quick bits of important information back and forth between employees - it's one way to effectively multitask without getting too distracted. A handful of quick abbreviated words and we can move on with whatever task we're engaged in.

## CRM Recommendation: [SalesForce.com](http://SalesForce.com)

### Non-communications online tools:

I guess in one sense anything that's online is, by definition, a communications tool. But what I mean by non-communications is simply that it isn't replacing what might otherwise be done with a phone.

**SalesForce** - As Newfangled has grown I've had to adapt to using various different business management software systems. For example, early on I used Excel and a custom FileMaker database to manage my books, do invoicing and so forth. At one point an employee involved

in our bookkeeping basically insisted on moving to QuickBooks. His urging, and the yearly pleas from my accountant to drop my goofy homemade system, won out and I moved to QuickBooks. It's hard to leave something familiar, even when it's admittedly inadequate, for something unfamiliar and much more sophisticated. Honestly, I hated the transition. It took me three times longer to create an invoice or pay a credit card bill. However, once I adapted, I not only learned the new system, but it was actually much faster than my old one. Not only that, but it forced me to learn how to handle my books in ways that the rest of the world did. I actually began to understand what my accountant meant by cash flow, balance sheets, and P&Ls (keep in mind I studied letterpress printing and wood engraving at school - not business management). It was a hard, but in the end, a good thing for me to go through.

SalesForce, like QuickBooks, challenged my internal, often wacky business processes by forcing me to fit my methods into their more standard, broadly understood methods. SalesForce is a web based CRM (customer relationship management) system. It has a ton of capabilities, and it can be customized and integrated with just about anything under the sun. But for now I just use its basic capabilities. It has become our "source of truth" for contact and account status information. We can access a complete list of every client, all their various contacts, and all the projects in progress for each client. It is also a great way of tracking our new business pipeline. This has been especially helpful to me since Mark O'Brien handles just about all of our sales, proposal writing and new business inquiries. The two of us used to have to have frequent detailed conversations about new business prospects, current maintenance projects, who needed to be billed for what and when, etc. There were so many details and so much potential for items to slip through the cracks. SalesForce allows us to enter every opportunity, its details, contacts, proposals, category, likelihood, and potential timeframe. We move each opportunity through its progression from new business lead, proposal stage, and finally - hopefully, a project win. A robust and customizable report/dashboard system shows me hour-by-hour what needs to be billed and what projects are likely to land soon. We still have conversation about status and subtle details for specific projects but we get a lot more done in much less time with our up-to-date SalesForce data in front of us.

Adapting to SalesForce did take a good chunk of time and effort. As part of the process I made changes to our internal administrative tools, and even a few changes to how I use QuickBooks. But after working it all through I have a much tighter, better organized system.

## **RackSpace File Server**

**Off-site secure file server** - One final system we adopted was an external file server. We already host all our sites through our managed hosting provider RackSpace. They provide an excellent service and their infrastructure and network are outstanding. When we realized that we were going to be in transit for an extended period of time we realized that access to our internal files from anywhere we might be would be difficult with our internal system. And if we can't get to our development sites or our internal working files we couldn't do our most basic jobs. In order to not have to set up, re-set up, and administer a complex and security sensitive server we decided to move it to RackSpace. With our new external file server we can access our development files from anywhere. No more administrative hassles. We have super security, automated backups and archiving, and a dependable network.

Our transitional situation forced us to move to a bunch of new internet-based off-site systems. We now can successfully work from pretty much anywhere in the world. That being said we all are looking forward to getting back together in an office environment, albeit two offices rather than one. But I'm glad that now that we've found the systems that give us maximum flexibility, when we are all in one place, we'll be able to focus on our essential jobs. We won't have to wrestle with phone systems, file servers, and fax machines that run out of paper. And that's a good thing.