August 2008

The GoldMine® Advisor

Editor

DJ Hunt

Contributors

David Brydson

Neil Saviano

David Tran

Steve Wanmer

Articles In This Issue

Tips, Tricks & Things

Business Automation Series

by

David Brydson

Simplifying Business Automation

Mention Business Automation to a small business owner, and you will most likely get a blank stare. Yet the small business owner needs to automate as urgently as his bigger siblings if he is to survive. This article gives the Value Added Reseller a plain English explanation of Business Automation that they can use with prospective clients, and a simple method to identify those areas of the client's business which most need to be automated.

What Is Business Automation, and What Does It Mean to the Average Business?

The average business owner is unlikely to be able to answer the question, but would be certain that they didn't want any part of it. Nor would they be particularly enthusiastic about discussing their Business Process Management.

Yet all businesses have business processes that they must manage if they are to operate their firms; and since all businesses have competition, they must become better at what they do if they are to survive. So, they must improve their processes, and use their computerized tools to execute more of the processes for better efficiency and effectiveness. In other words, they must automate their businesses wherever it is possible and wherever it makes sense. We will address the hard stuff first.

What Holds Business Owners Back?

Ignoring for a moment the perceived cost of automating, the largest barrier is probably Techno-speak. And we are probably heavy contributors to this barrier. In short, business owners don't understand what we are telling them. People usually back away from mysterious things. The gap between business and technology is so wide that an entire discipline has evolved to deal with the challenge of translating technical terms to ordinary business terminology, SBVR.

An Enterprise-Level Solution Points the Way

The Semantics of Business Vocabulary and Business Rules (SBVR) is a comprehensive specification that was developed for Enterprise-sized businesses to cover:

1. **Business Vocabulary** (concepts; representations including terms, names, and definitions; definitional rules and advices of possibility) — in a special purpose language used to connect concepts, employed as a natural language.

2. **Behaviorial Guidance** (business policies, operative business rules, and advices of permission) that governs business actions of an organization.

(Continued on Page 2)

Legalese

Editor: **DJ Hunt**

Although I try to edit these articles for content and accuracy, I cannot always guarantee their content is 100% accurate. Should you use anything information contained in this newsletter, you do so at your own risk. All information contained herein is not intended as specific advice, but as a general point of discussion. Should you find an error, it would be nice if you e-mailed me so that I may print the exception in the next issue of this newsletter.

All articles are freely contributed by their author, and no compensation is given for any article published in this newsletter. In many cases the authors have had a technical expert, in the area of the document, preview the document for content and accuracy.

All major article contributors will have a business card displayed on the last page of this document. You are encouraged to clip the business card, and save it. Do not contact the author directly unless, at the end of their article, they have made a declaration of sorts that states that you may contact them personally.

All questions, and future articles should be submitted to:

DJ@DJHunt.US

If you are including screenshots, they should be no wider than 3.57" US. Their print resolution should be 300 dpi, and they should be in a png format or jpg format.

Major contributors are also asked to submit a 1" US wide portrait photo. The print resolution should be 300 dpi, and the format should also be in a png or jpg format.

We accept all articles, however, the editor reserves the right to determine which articles are included, and into which issues they are to be included.

I am your editor:

DJ Hunt
Computerese
152 Pratt Road
Fitchburg, MA 01420
USA

(978)342-3333

DJ@DJ-Hunt.com
www.DJ-Hunt.com

(Continued from Page 2 - Business Automation Series)

While employing a special purpose language is much too complicated for the average business, it does suggest a way to convert business requirements to technical plans.

Use Everyday Business Vocabulary, Except . . .

Everyday business language won't work unless we do two things to give it more power:

1. Create precise definitions for business terms, which all parties will use.

2. Develop business rules to govern the actions of the organization.

By following the same principles as the enterprise solution, we can accomplish the same ends. One shouldn't minimize the importance of these two actions. Of the two, the first will be the most difficult. For example, getting two or more people to agree on the definition of an Order is much harder than just saying it. Making sure that everyone sticks to that definition will be a task requiring mutual encouragement and frequent reminders.

What Words, and How to Find Them

Since you will be gathering words to describe business processes, you will need nouns, verbs, and modifiers to be able to describe the flow of a client's business. The easiest way to start assembling the glossary is to have the client explain their business flow into a recorder from the first thought of promotion, all the way to final payment of an invoice. As you intend to automate wherever possible, make note of anyplace they duplicate actions, particularly large time wasters like keypunch. Let them know that you will need another session to discuss definitions of the words you gather.

Make a real effort to be dense as they explain their flow. This is not the place to dazzle them with your brilliance. Ask lots of questions about **Why** they do things, **How** they do things, **Where** they do things, and **What** they mean when they say something. This should surface hidden assumptions, as well as reveal what word meaning is generally understood in the company. By the time you complete this exercise, you will have a list of words on whose definition both you and the client agree, and a very detailed understanding of their current process flow.

What Happened to the Simplify?

Yes, this is a lot of up-front work that doesn't seem to be moving you forward very fast, but you will see the dividends later. First of all, the collaboration regarding terms should eliminate the **I thought you said . . .** discussion that frequently happens late in a project, necessitating rework. Continual questioning of word meaning in the context of business process serves to uncover importance and expectations that are not explicitly stated. This becomes a second **Discovery** process, which brings into the open issues that need recognition and airing. The immediate benefit is a clearer understanding of the client's processes and their fundamental objectives.

(Continued on Page 3)

(Continued from Page 2 - Business Automation Series)

Eliminating Duplicate Processes

When you review the client's processes, you will invariably find duplicates or conflicts which are candidates for elimination, and some processes that can be reused elsewhere in the client's system. You will want that information for the next article, Business Processes and Business Automation.

Eliminating Double Entry

An enormous impediment to Business Automation is multiple databases. GoldMine has a database. QuickBooks or MAS 90/200 has a database. They never agree, and information from one must be keyed into the other all the time. If they can be connected to function as a single database, then some real business automation work can be done. BestFit Business MGR is a program that connects GoldMine to the most popular accounting software and unifies the database. The most immediate benefit is the complete elimination of keyed order entry. That's right, complete elimination.

Until customers no longer need quotations, sales will have to prepare them. BestFit Business MGR converts the quotations directly into orders with a few key clicks. As a first step, it's a big one. Keypunch errors should shrink to one-third, and key entry time should drop to somewhere in the 35-45% area. Additional benefits can be gained by simplifying and automating the client's processes inside the program. This is made possible by configuring the program to use the new processes.

With an agreed-upon glossary of terms, and an understanding of what the client wants to accomplish, you are now prepared to begin the process of streamlining the client's processes and applying automation techniques to them. The next article will deal with structuring business processes using the Zachman model, and testing them against the 'old' processes to insure they work equally as well or better.

Managing Information

by

Neil Saviano

Gathering, processing and using customer information with varied technologies is, and will continue to be, a dominant contributor in maintaining company profitability and growth. A company's benchmark in their overall effectiveness in managing and using technology-based customer information should come from the answers to the following questions:

- How much do we know about what are customers are buying and not buying from us, and how they are buying?

- How much do we know about our customer demographics that influence buying?

- How do we use the information we have to implement effective and ongoing sales and marketing programs?

- How do we gather and use information that helps us to monitor our activities, namely the information management and sales and marketing processes being driven by sales and customer service?

The answers to these questions strongly relate to a company's use of the technologies currently available. Company back-end systems compile customer buying history, but technology is needed to relate this history to areas such as the level of current customer penetration and retention. These metrics are critical, as penetration and retention directly determines profitability on a customer-by-customer basis – both short and long term. Sales and marketing analytical tools are available to help companies and their salespeople look at each customer and the level of penetration and retention on a one-to-one basis.

Technology is also needed to help companies develop benchmarks such as, customer profiles and how it relates to the level of penetration and retention needed to assure customer sales growth and profitability. CRM and Sales Force Automation software provides a place to put this information for easy access and retrieval for sales and marketing campaigns as well as usage by CSR's in their every day customer-facing activities. In essence, it answers the question: The information is there – now how do we act on it to drive business and profits?

The **Sales Force Automation** components of GoldMine Corporate/Premium Editions provide the functionality to efficiently and effectively act on this information. Customer classifications that identify, as an example, levels of customer penetration can be grouped together to form a target segment for a campaign. The campaign can be efficiently and effectively automated and contain a series of strategic calls, visits, e-mails and other promotional efforts.

Managing information that goes beyond buying history and business potential also plays a key role in customer development; this relates to business demographics and other customer - centric information. Beyond some of the information listed above, some other examples are: type of vertical industry, location and number of locations, customer personal issues and any other customer information that is worth remembering, and used for semi-automated and automated campaigns along with individual customer targeting. This is the kind of information that helps companies make a value-added difference with a customer in a volatile marketplace. Products and services that address specific customer needs within their vertical and make it easier for them to do business with a company, and do business overall, can go a long way in building and sustaining relationships.

The use of information and technology isn't limited to working with just customers. Prospecting programs and their success are tied to the efficiencies and consistencies that technology provides. Prospect information, as an example, is used to create prospect classifications using some of the demographic customer-centric information related above. Some examples of classifications are: Type (hot-cold, etc), contact frequency, status (interested/not interested), etc. This is another example of the use of CRM and Sales Force Automation software and the capacity to target and touch as the situation dictates.

There is a strong need for companies to also have systems in place to monitor the information-centric activities and campaigns to assure that the work is being done. Reporting and push reporting (automatic reports sent to management and representatives) programs to identify that the activities are taking place according to plan are available. Coded reports can

(Continued on Page 4)

(Continued from Page 3 - Managing Information)

show types of activities such as follow ups, cold calls, interested and not-interested, appointment/presentations. CSR issues resolved, etc. As in any company program that involves people working within a strategy and with systems, accountability is a must to assure staying on course. CRM software provides a place for activities and all of the related notes for each activity that can be accessed quickly. Calendaring is also included to show future activities and the information tied to each one. Each kind of activity is automatically posted to a report.

There is no doubt that the proliferation of competition places a strong need for companies to have the capacity to gather store and use customer and prospect information in a way that is going to give them a decided competitive advantage. This entails making sure that the correct technology is in place. It means looking at the technology environment holistically beyond the back-end system. Making sure the synergies are there with sales and marketing analytical software and CRM and Sales Force Automation software. Most importantly, it's mandatory that personnel use this information and processes in place to monitor this usage. Technology and information are assuredly the way for companies to emulate the processes and strategies of their major and bigger competitors. It can be labeled **the great equalizer**!

GoldMine 7.50.80618 Released

Reprint from 3cubed

David Tran

GoldMine Corporate Edition 7.5 has now been released. 3cubed will now complete our side of testing to ensure it's right for release to our clients. This includes integration with other software and 3rd party addons. Once we're happy everything is okay, we'll begin contacting our clients to arrange for an upgrade.

GMCE 7.5 product improvements include:

- Support for Microsoft Windows Vista and Microsoft Office 2007
- Enables integration with these latest versions of Microsoft Word, Excel and Outlook, as well as, the latest release of Microsoft's Operating System
- Numerous Database & Performance enhancements
- Synchronisation and database re-hosting performance enhancements
- Removal of 2GB limitation for synchronisation transfer sets and installation files for one-button synchronisation
- E-mail improvements for better security & email client interoperability
- Secure SSL connections are now supported in the E-mail center
- IMAP protocol is now supported in the E-mail center

Why Systemise Your Business

Reprint from 3cubed

Steve Wanmer

You know everything that needs to be done in your business, right? So what's the purpose of taking time to document all your systems? How will that mean more money and more time for you? Check how your business stacks up against our definition of a successful business ...

A successful business is a commercial profitable enterprise that works without you.

Would you like to know you can take time away to follow your personal interests, or go on a 6 month round the world cruise, confident that your business will be operating even better on your return? Then read on ...

The basic rule for systemising is ***Systemise the routine, humanise the exception***. Anything that can't be systemised needs to be run by people. Always look at putting a system in place rather than employing more people. A system means that things get done and are done consistently, regardless of the team member.

Remember...

- ***Systems run your business...***
- ***People run your systems...***
- ***You lead your people...***

There are four basic steps to systemisation...

1. Flowchart your processes. This will show you how it all fits together.

2. Document how it gets done. Get the team member who is currently doing the job to write down every step in performing a task. This person then gets a new person to do the task with the written down steps. If the person currently doing the task has to step in and explain anything to the new person then add that step etc. Once completed start again with another person until any person can do the task without intervention.

3. Measure using key performance indicators. Typically, these will be the top five measures to show system performance. Get these from the person doing the job, eg. in sales you could use number of leads, conversion rate, average $ sale etc.

4. Allow the system to change/grow. Ensure the system is self-correcting and can evolve itself.

When figuring out where to start systemising, ask yourself...

1. What am I doing on a regular basis that a lower paid team member could be doing if it were systemised? Systemise it, hand it over to the lower paid team member and spend your time on higher-level activities.

(Continued on Page 5)

(Continued from Page 4 - Why Systemise Your Business)

2. Is there anything I hate doing which could be done by a lower paid person if it were systemised? Systemise it and hand it over.

Some final tips...

1. Don't over complicate systems or people won't follow them.

2. Use lots of photos, videos, tapes etc. This may be as simple as printing a computer screen or videoing someone doing the task at hand. This will make the systems much easier to follow.

3. Document your system in a policies and procedures or operations manual in an easy to access format like GoldMine's Knowledge Base. And make sure everyone knows where it is!

Editors Note

Steve has made some excellent points in his article. These are things that I have mentioned in many of my books, however, Steve has laid the process out in a much clearer manner.

The key pont to remember, as I see it, is that you must have a process before you can automate a process regardless of your CRM solution.

Take Out the Trash - Keep Your Data Clean

by

David Brydson

Over the last ten years, companies have spent billions of dollars to reinvent sales, marketing and service operations in their companies. Most of this was the result of trying to either get in front of the changes in the business climate of an always available, and easy 24/7 access to competitors, world-wide economy. For some, it has been about catching up to those changes. Either way, the changes had to be made or businesses went away and many have and continue to just that.

Customer Relationship Management (CRM) has been the hub of this turning wheel, and data is the axle on which they turn. That is why managing customer-related data is the number one obstacle to getting a return on CRM investments. Most organizations do a very poor job of managing this data effectively over time.

When rolling out the system initially, decisions were made about the data that needed to be captured to achieve the desired results; at that moment in time. Then, maybe, there were additional criteria(s) established, and some user defined fields added. Some data was imported and work began. More data was added and some data in your fields was modified, most fields never were.

This is especially true for some of the key fields as well. I can not tell you how may systems we have worked on and found that the users were never updating the key fields area from *Prospect* to *Customer* once the deal was closed. The more telling story is that once the record was updated to the coveted *Customer* status; it never was modified again.

One company said to me, proudly, that over 80% of the 2,500 contacts in their database were customers, but sales were dropping and wanted to know why. We began looking at their data to see, indeed, over 2,000 of the records were customers; but more than 800 of them had not made a purchase in over 5 years, and another 600 had not purchased in the last 2-3 years. This was critical information for a company that expected between 2 to 4 sales a year from its customers.

THE PROBLEM:

More effort was placed on *Customer* acquisition than on retention, and once the contact record obtained the status; no one was monitoring what happened with it. No one looked at when they stopped buying, and technically stopped being a customer.

THE SOLUTION:

You need to establish the definition of what is a Customer and, as well, when they stop being a Customer. This can be tracked by a field called *Status*. Data is *Active* or *Non Active* based in the criteria you establish.

The same was true for the 175 records that had sales, but were flagged as *Prospects* in the system. These records kept getting *Please become our customer...* marketing material, even though they were already purchasing from them. What did that say to them as *Customers*?

Look at the data in your CRM system.

Does it truly reflect current, accurate, complete, and actionable information? I bet not.

How many contacts have the designation of *Customer* that have not made a purchase in *Some Time*?

I can't tell you what defines *Some Time*, because your company's definition will be unique to you. Maybe, as a Car Dealer it is 5 or 7 years, a HVAC company might be only 6 months.

Use the following to get this information: (adjust the dates as needed)

No Sales Since:

```
select Company,
  Contact,
  Address1,
  Address2,
  City,
  State,
  Zip,
  Phone1 as Telephone
from Contact1
where AccountNo in
  (select AccountNo
  from ContHist
  where OnDate >= '1/1/2006'
    and OnDate <= '12/31/2006'
```

(Continued on Page 6)

(Continued from Page 5 - Take Out the Trash - Keep Your Data Clean)

```
    and RecType like 'S%'
    and RecType not like '%U%')
    and Accountno not in
      (select AccountNo from ContHist
      where OnDate >= '1/1/2007'
        and RecType like 'S%'
        and RecType not like '%U%')
```

Last Sale by Date – Desending:

```
select Contact1.Company,
  Contact1.Contact,
  Contact1.Key1,
  ContHist.Userid,
  ContHist.OnDate,
  ContHist.Ref
from Contact1,
  ContHist
where Contact1.AccountNo = ContHist.AccountNo
  and ContHist.Recid in
    (select max(RecID)
    from ContHist
    where sRecType = 'S'
    group by AccountNo)
order by ContHist.OnDate Desc
```

Look at your Suspects and Prospects.

- Have they been in your system for years?
- How many have no contact history at all?
- How many have not had a contact in 1 year, 2 years or more?
- How many were contacted once or twice and then just left to die in the database?

Taking up space and making it appear that you have a vast pool in each category. Yet, most will not have any pending activity assigned to them.

Use the following to get this information: (adjust as needed)

No Contact History:

```
select AccountNo,
  Company
from Contact1
where AccountNo not in
  (select distinct AccountNo
  from ContHist)
```

No History for x Days:

```
select Company,
  Contact,
  Address1,
  Address2,
  City,
  State,
  Zip,
  Phone1 as Telephone
from Contact1
where CreateOn >= '1/1/2007'
  and AccountNo not in
    (select AccountNo
    from ContHist
    where OnDate >= '1/1/2007')
```

No Pending Activity:

```
select Contact
from Contact1
where AccountNo not in
  (select Contact1.AccountNo
  from Contact1,
    Cal
  where Contact1.AccountNo=Cal.AccountNo
    and Contact1.Key1 = 'Prospect')
```

To fully exploit the power of CRM, and to realize its much-hyped promises, organizations need to recognize that the customer-related data often residing in their database is only a snapshot in time. If there is not a method for keeping it current; (Like an Automated Process that looks at last sale date and updates the Status field) then it diminishes in value over time and turns into garbage.

An on-going review of the data in your system can ensure that what you have is the most current, as accurate as possible, and can be acted upon by your organization. Then you can start using the data in your analysis to get the right message to the right contact at the correct time.

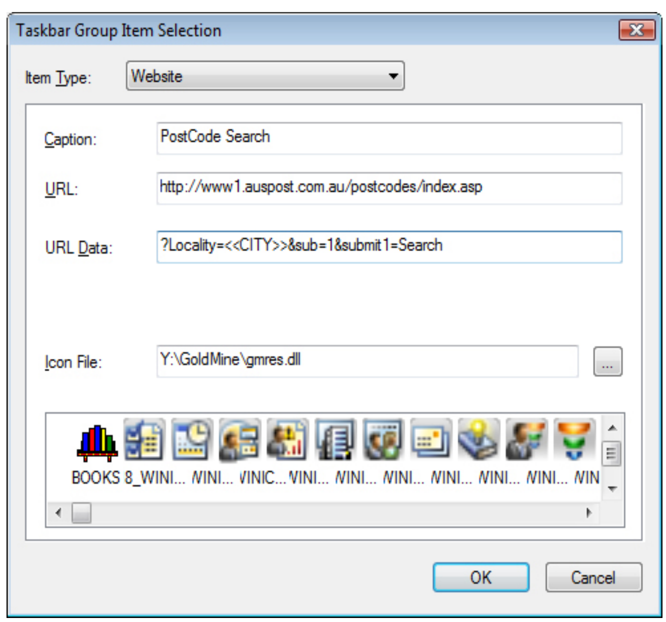
Tips, Tricks & Things

PostCode Search in Taskbar

Reprint from 3cubed

David Tran

Have you ever started typing an address, and not known the postcode? Here's a quick way to look it up on the Australia Post website.



(Continued on Page 7)

(Continued from Page 6 - PostCode Search in Taskbar)

1. Create a new taskbar entry by clicking on the **Customize** button on your toolbar. Right click and select **Add New Item**. (In Standard and Corporate Editions, right click on your displayed Taskbar and select Add New Item).

2. Select item type is **Website**, and add the fields as per the picture shown on page 6.

   Caption: **PostCode**

   URL: **http://www1.auspost.com.au/postcodes/index.asp**

   URL Data: **?Locality=<<CITY>>&sub=1&submit1=Search**

3. Now, whenever you're searching for the postcode, after you've entered the suburb details, simply click on your Postcode Search icon on your taskbar, and it will search the Australia Post website for it.

Editors Note

As a good GoldMine Administrator, you should be able to easily convert the URL, and the URL Data values to benefit those of you residing in other countries. David has given us the technical know how. It is up to you to make this function properly for your organization.

List Existing Data in GoldMine Premium

Reprint from June

GoldMine Tech Tips

A new F2 lookup setup option in GoldMine Premium Edition lets you list existing data.

Checking the *List existing data* box will load all data entered in that field to the F2 lookup list. **Note:** Selecting this option grays out the *Allow adding*, *Allow editing*, and *Allow deleting* options.

This feature is not currently available in GoldMine Corporate Edition 7.04 or GoldMine Corporate Edition 7.5.

Dock/Pin the Process Monitor

Reprint from June

GoldMine Tech Tips

At times, the process monitor pops up in the middle of the GoldMine Premium Edition window.

The easiest resolution (GoldMine Premium Edition 8.02 and prior): dock the process monitor window, and then PIN it closed. To dock your process monitor, simply drag the window to any side of your GoldMine workspace. Once docked, the user can click on the push-pin icon to *pin* the process monitor closed. Once pinned, the process monitor will only open when you hover your mouse over the pinned process monitor title bar at the edge of the screen.

Editors Note

We expect GoldMine Premium Edition 8.03 to have been released by the time you are reading this newsletter. In GMPE 8.03, you will find the ability via the Process Monitor Toolbar to *Show as MDI Window*. The Process Monitor Window will then act as do all of your other windows within GoldMine Windowed mode or Tabbed mode. This is much more preferable to the previous docked style in my opinion.

Making Completed Activities Show Up On Your Calendar

by

Gene Marks

Do you want to make completed activities show up on your calendar?

By default, after you complete an activity it will no longer appear on the GoldMine calendar. If you'd like to see your completed activities, do the following:

* Right-Click within the calendar, and choose **Activities**.

* Check the types of completed activities that you wish to display from the list on the right hand side of the window.

* Click **OK**. The completed activities will now appear on the calendar with a gray background and a strikethough line.

Finding Out Which Automated Process Is Failing

by

Gene Marks

A client recently asked: One of my automated processes is failing. How can I tell which track it is?

Create an entry for Automated Processes that will outline each step in every track. To do this, open the UserID.ini for the person you are logged in as, and insert the following section:

[GoldMine]
APDebugLog=1

This will set the process monitor to report on each individual section of an Automated Process.

An example of the Process Monitor after this feature is enabled:

0[1] Automated Processes [12:18 am - 4/30/2008]
0[1] Scanning Contact: Blue Pelican Consulting; Parker Fillman

(Continued on Page 8)

(Continued from Page 7 - Tips, Tricks & Things)

0[1]Read Track:Opportunity[Next Event: 100, Track: 100012]
0[1] 10 If sale, attach to Customer Welcome
0[1] 20 If sale, remove from Opportunity
0[1] 100 Print Letter: Sales Proposal
0[1] --> Triggered.
0[1] Print Form [5NTC1VO$OXV2MPX]
3[1] Error printing form [5NTC1VO$OXV2MPX]
0[1] 110 Verify forecast probability & date
0[1] --> Triggered.
0[1] Schedule: 4/30/2008 NATALIE Verify that probability and close date have not changed--
0[1] 120 Check for uncleared follow-up call
4[1] Automated Processes: 1 Contacts; 1 Scanned; 2 Triggered; 1 Pass(es) [Ended 12:18 am-4/30/2008; Dur: 0:01]

This should enable you to tell which track is failing so that you can correct the problem.

Editors Note

It's a good idea to only leave this statement in the UserID.ini while you are attempting to discover issues with your Automated Processes. Once the Automated Processes have proved themselves, you should change the statement in the UserID.ini to:

[GoldMine]
APDebugLog=0

This, effectively, turns the AP Debug Logging off.

This Issues Major Contributors

Your Publisher/Editor

Computerese

DJ Hunt
GoldMine Technical Support

152 Pratt Road
Fitchburg, Ma 01420
USA

(978)342-3333
DJ@DJHunt.US
http://www.DJHunt.US

Business Automation Series

LaDara Enterprises

David Brydson

11124 NE Halsey Street, #686
Portland, OR 97220
USA

(503)788-7789 x 112
DBrydson@LaDara.com
http://www.LaDara.com

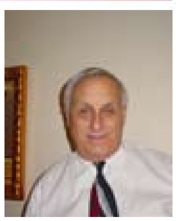
Managing Information

Longbow Consulting Group

Neil Saviano
Owner

100 Cummings Center
Suite 207P
Beverly, Ma 01915 USA

(978)777-1848
Neil@LongbowCG.com
http://www.LongbowCG.com



GoldMine 7.50.80618 Released

3Cubed Pty Ltd

David Tran

PO Box 6041
Upper Mount Gravatt, QLD
4122
Australia

1300 32 82 33 x 301
DTran@3Cubed.com.au
http://www.3Cubed.com.au

Why Systemise Your Business

ActionCOACH

Steve Wanmer

5781 S. Fort Apache
Las Vega, NV 89148
USA

(888)483-2828
StephenWanmer@actioncoach.com
http://www.ActionCoach.com/

Your Article Title Here

Your Company Name Here

Your Name Here
We are always looking for GoldMine articles for future issues of The **GoldMine** Advisor.

Please submit any articles, whitepapers, or stories you have, and wish to have published to:

DJ@DJHunt.US