

## EFFECTIVE ON-LINE TOOLS FOR DUMMIES, Ruben Hernandez

There will be a presentation on free or low-cost tools for doing:

- 1) Sales & Marketing
- 2) Operations
- 3) Finances

There are 3 options for how people may be hosting information:

- 1) Web-based
- 2) Desktop
- 3) Manual/ paper

Who is currently using what : 1<sup>st</sup> gathered information from participants:

Have a site?

Toxic Soil Busters: Y

Joe, Arizmendi: Y

Lusty Ladies, SF: Y

CWCF: Y

Christina, Monument Futures: Y

Greg, Algiers Comm'ty Coll'ive &

C Gd Health Clinic: Clinic has a site; Coll've: Facebook gp.:

Customer/ member info:

Internal document mngt:

Desktop / manual; N.A.; N.A.; Desktop & e-mail;

Newsletter?:

Web-based; manual; Manual & e-mail;

Finances?

Desktop (excel); Excel & MYOB; Manual & Excel; Simply Accounting & Desktop; ?; Clinic – Accountant; none at the Collective.

Scheduling internal meetings?

Pre-set regular meetings & phone calls; manual & [www.whenisgood.net](http://www.whenisgood.net); Manual & e-mail; manual & e-mail. Can use E-vite.

CONTENT OF WORKSHOP:

CRM: is about relationship btw an individual (either customer or member) & an organization. "Customer Relationship Management". Can use for key customer/ member information;

newsletters; meeting scheduling. You can segment your customers by “clusters”, showing their information. Does not do financials.

It is a central database of customers to do follow-up with.

CMS: Content Mngt Systems. In the old days, with html people were forced to send changes to a programmer. With CMS, it is possible for anyone to make changes, if they know how to use MS Word.

Task/ Document Mngt: there are many programs for this, including some excellent free ones. For doc't mng'ng, calendaring and projects with tasks.

Calendaring: there is other software.

To entrench any tool, there has to be a champion who will set it up & champion it. Otherwise org's end up using the tool inconsistently.

Samples of software:

(1) Task & document mngt: [www.dotproject.net](http://www.dotproject.net) It is Open Source & community built. It needs to be downloaded to a server, which one needs to know how to do. One also has to configure the system for one's own needs. (There are other programs which can be done directly on the web, but will charge a signif monthly fee, eg \$100). One's hosting company has to be pretty flexible to bring this software in there. One pays hosting fee, but no software fee.

With dotproject, it is easy to add users who can deal with the files. It is made so that only one user can change a document at a time. It holds any type of file, b/c it's web-based.

A reminder will send an e-mail to users. This system is good for members, not so much customers; it is more for internal purposes. It is good for keeping people accountable. There is a task log, which allows people to all track what they've done; can be filtered by name as to what people have done.

How secure this is will depend on your hosting company; they need to provide encryption, etc. Same with back-up; the hosting co needs to do it.

It keeps people more acct'able when everything is kept in 1 place. In updating what work one has done, one can send e-mails to anyone; & also insert links. It allows one to get away from e-mail if desired.

Examples of good uses: business plans, strategic plans, etc. The tool has good features, but whether or not it will work depends on people.

(2) CMS: Content Mngt Systems: web sites.

Four Elements Global site: in Joomla.

There are many different CM Systems: there are Open Source systems (eg Joomla- [joomla.org](http://joomla.org); ). This is very easy to use; the challenge is to get it set up. Then one can easily make changes to the site. One can use calendaring.

There is also Drupal ([drupal.org](http://drupal.org)); another very popular CMS. Drupal also includes CRM as a feature of the program.

Collective in NY, "May 1<sup>st</sup>" installs Drupal systems; reasonably priced & good.

Hosting system: Gaia Host.

W/ both Drupal & Joomla, members can do social networking within the site. The more integrated you want it to be, the more expensive it will be. Both systems need to be hosted somewhere, & one needs to work with someone who knows it.

Can a computer proficient non-web site techie set this up? It's feasible if one has time to read the manuals, & if one has a supportive hosting co. One needs to hire a graphic designer (or use their templates, but they're generic).

One good host: [www.siteground.com](http://www.siteground.com)

Upon installing, there are manuals on how to install the site.

It is best not to use multiple different systems, b/c staff / consultants only need to know one system.

(3) CRM: [www.SugarCRM.com](http://www.SugarCRM.com)

A very good system. Can be used to track information on potential members / users. All info is in one place.

One excellent feature : Accounts. This is about an organization to whom, eg., one wants to sell to. Can include: activities, history, contacts, opportunities. One can provide all services provided to all customers. This is a relational dbase, meaning that many things relate to others.

There are 2 options: Paid (\$40/ mo per user); or download it to one's hosting co. It is quite time-consuming to update the system.

(4) Newsletters:

A good site is: Constant Contact. One can send out newsletters, & surveys. Starts at \$15/ month. There is no Open Source options.

However, there is PHP list: is good for newsletters. It is free, but requires some knowledge. One can select templates; not necessary to know programming or html. Stats are easily kept, including on number / list of e-mail addresses which bounced; those who opened the e-mail.

For surveys, he recommends [www.SurveyMonkey.com](http://www.SurveyMonkey.com). It is free to inexpensive, & works well.

There is a non-profit technology network; does much good work.

[www.groundspring.org](http://www.groundspring.org): a fund-raising tool. Again, the key is that people have to use it. It does newsletters, & also donations, as an integrated tool. This makes it more popular with non-profits.