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System Smarts

By: Les Cunningham

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As company owner, you know what your business needs to survive in this economy. It's more than just knowledge is translated into action, set up systems that you can expand and upgrade as your company grows.

At the entry level, you can use [Microsoft Outlook](#) to track leads, [Microsoft Excel](#) for estimating, and [QuickBooks](#) for accounting. At the advanced level, use [ACT!](#) for lead tracking, [Xactimate](#) for estimating, and [A-Systems](#) or [Proven Solutions Accounting](#) for accounting. You can then connect these software packages and share information to provide greater efficiency and better reporting.

These systems will allow you to regularly analyze your business using real-time data so you can make intelligent, timely decisions to both manage and lead your company.

Maximize Effectiveness

As owner, you must be technically proficient with all the systems you use and must stay involved in using them or you risk having staff use systems incorrectly, diminishing their usefulness. You should be able to use the systems to communicate with all employees, including those in the field, and to use them to create a database of past, present, and future clients.

For best results, you should be able to access the system remotely. If you spend a lot of time on the road, use the following pieces of hardware and software: a [Bluetooth](#) hands-free speaker system inside the vehicle and a [Blackberry](#) or equivalent smart phone for making and receiving calls and for sending and receiving e-mail and text messages. You'll also need a laptop to access your company systems. Once you set up and use these systems and hardware, you'll also know what will work best for your employees.

—Les Cunningham is president of Business Networks, a peer-review organization for the remodeling and insurance restoration industries. les@businessnetworks.com.

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