



CONSULTING MATTERS

A publication of the Delaware Valley Chapter of the Independent Computer Consultants Association

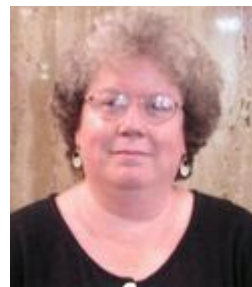
www.iccadelval.org

October 2004

From the Secretary...

Staying Organized and Managing Time – Success and Failure

by Cynthia S. Cole
Computer Concepts and Methods
Secretary
ICCA/Delaware Valley



Cynthia S. Cole
Computer Concepts and Methods
Secretary
ICCA Delaware Valley

Our chapter president, Keith Mast, asked me to take a turn at writing an article. I decided to write about some techniques that I have found effective for staying organized and managing my time. I'll also share some of my frustrations in these areas. For example, I am always delinquent at writing up the ICCA board minutes; client work or family commitments always seem to get in the way.

I'll focus mostly on techniques I use in my business, although some apply to life in general. I'd like to hear from anyone who has his or her own successes and failures to share. E-mail me at CindyCole@ccam.biz, or better yet, share them with the ICCA members' forum. Check the ICCA/Delaware Valley web site at www.iccadelval.org for instructions on how to sign up for the forum E-mail list.

E-mail

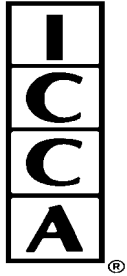
Spam, spam and more spam...I've given up on spam filters. They block too much or too little, are too time-consuming to maintain, and annoy those people with legitimate need to send me E-mail. Instead, I've adopted a discipline for handling my E-mail box:

- First, I set up folders to handle each client and other topics: ICCA, family, friends, shopping, finance, etc.
- I look at my E-mail at least once every day, if possible; on workdays, three or four times during the day.
- I've turned off the option for Outlook to alert me when mail arrives. Too distracting!
- Each time I look at the new mail in my In Box, I sort by "From" (sender), and quickly delete those that are unwanted.
- Then I look at each of the legitimate senders. If the subject that requires immediate attention, I'll take care of it, then delete it, or file it in the appropriate folder. Sometimes I print it for my project or personal files. See notes on Paper Clutter below.
- If the subject is just information, I'll read it, then delete, print, or file.
- If the subject requires more time and attention than I have at the moment, it stays in my In Box until I have more time.

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**Meeting
Information
610-394-9090**

info@iccaderval.org
www.iccaderval.org

6:00 P.M. Networking & Cash Bar
7:00 P.M. Dinner
8:15 P.M. Meeting & Program

Entire Evening Prepaid	\$30 Members	\$40 Guest
Entire Evening at Door	\$40 Members	\$45 Guest
Networking/Speaker	Free Members	\$5 Guest

First time guests pay member rates. Prepayment must be received and cancellations for refunds must be made by Monday before meeting. Credit Cards accepted (MC, Visa, Discover). If there is more than one person in your party, we request that you pre-pay. Note that making a reservation is a promise to pay. "No-Shows" will be billed.

Mail Check Payable to:
ICCA Delaware Valley
125 N. Highland Avenue
Lansdowne, PA 19050

**Meeting Locations:
(Please call the hotel for directions.)**

Philadelphia Airport Hilton

215-365-4150
4509 Island Avenue
Philadelphia, PA

DoubleTree Guest Suites

610-834-8300
640 W. Germantown Pike
Plymouth Meeting, PA

Clairon Hotel

856-428-2300
Route 70 & I-295
Cherry Hill, NJ

Holiday Inn Select

302-792-2700
630 Naamans Road
Claymont, DE



**TOP TOPICS at
ICCA DeVal
2004-2005**

by Kathleen Conti, WebSquared, LLC

Varma Mitchell from **Temple SBDC** started off the 2004-2005 season with a very enjoyable meeting on "**Strategic Planning**" which was held at the Philadelphia Airport Hilton. I found out through conversations with Varma that she also has expertise with government contracts. I was thinking we should have her back some time in the future to cover that topic.

Our October program, "**Growing Your Business**" and will be presented by **Mel Payne** at the Holiday Inn Select in Claymont, DE. Mel is the President of **Knowledge and Success, Inc.** an assessment, training and development company located in Doylestown, PA. Utilizing a combination of experience, research and internationally recognized programs he develops business leaders, sales professionals and other employees and help them to achieve exceptional business results.

We now have 3 joint meetings set for the 2004-2005 season. In December we will be joined by the Project Management Institute – Delaware Valley Chapter – for the presentation on Linux and Open Source Technologies by Chris Fearnley. In March we will be teaming up with TEMPO and we are hoping that May will be a joint meeting with the IMA. I will make sure I pass on all the details as they are finalized.

At a recent board meeting we decided to pursue some new venues for our meetings. The first on my list to try will be the Towne House in Media. Centrally located (although a little hidden once you get to Media) this should be a great location. As per usual, my door is always open for suggestions on topics and locations that you would like to see in the future. See you in October.

October 14th is
Member
Recognition Night.
 Join us as we recognize 5 year, 10 year, 15 and 20 year members -- companies joining ICCA in 1979, 1984, 1989, 1994 and 1999



New Member Company Profile

In each issue of Consulting Matters, we introduce you to one or more new members and firms. In this issue, we introduce you to **Alexis Brownstein, Dr. Database LLC**

Alexis Brownstein founded Dr. Database LLC in July 2004. She has over 12 years experience in systems analysis, development and support as a full-time employee or consultant across multiple industries, including Automotive, Manufacturing, Healthcare, Financial Services and Telecommunications. She has a BA and an MBA from Rutgers, and is a CPIM (Certified in Production and Inventory Management) from the American Production and Inventory Control Society (APICS).

Over the last few years while working as a full-time employee, she has focused on Microsoft Access, including programming in Visual Basic. Her projects included stand-alone departmental databases as well as databases linking to Oracle systems through the ODBC. Through her

employer, she also volunteered to create a new database system for a local school for disabled children and was pleased to help such a worthwhile organization.

As Dr. Database, Alexis has already completed a project for a church organization, whose database needed to be redesigned so multiple users could work in it. She is currently working with a service company whose field technicians will complete a newly created service report in Word that will be loaded automatically into a new database, thereby creating service history that the company never had before.

Dr. Database specializes in Access database design/redesign, training and documentation, and automating processes between all the Microsoft Office products.

ICCA Upcoming Dinner Meeting Dates 2004

✧ **11/11 DoubleTree Guest Suites, Plymouth Meeting, PA**

Topic: Using Public Relations to Position Your Business

Presented by: Dan Goldberg

Description: Positioning your business for success and differentiating it from the competition is essential for substantial growth. Your public image and how it's delivered can help position your organization as an industry leader, innovator, expert, and/or company on the rise. Learn some proven public relations positioning techniques to help your business grow.

✧ **12/9 Clarion Hotel, Cherry Hill, NJ**

Topic: Survey of Linux and Open Source Technologies and their Business Functions

Presented by: Chris Fearnley

Description: An overview of what Linux and Open Source Technologies can provide to businesses and consultants (i.e., the business functions).

From the Secretary

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I also use E-mail in lieu of the telephone as much as possible. When working out the details of a project, a stream of E-mail is instant documentation of what was discussed and agreed upon. I encourage my clients to reply to each of my E-mails, even if it is just to acknowledge that they have received it. When a telephone or face-to-face conversation is imperative, I follow up with an E-mail that briefly documents what transpired.

The “To Do” List

I am a veteran list maker. Before I had a personal computer, I used a small loose-leaf notebook to make lists. Now I use an outline program on my laptop to do the same:

- I use a large outline to keep track of everything. I divide up the list by detailed categories. The outline software allows me to open and close categories as needed, and to move categories around, keeping the list manageable even though it is large.
- I keep urgent categories at the top of the list and less important categories at the bottom.
- Categories near the top of the list track each day of the week, each client project, items needed at various stores, etc.
- Categories at the bottom of the list track long term or low priority projects, holiday planning from year to year, and re-usable lists. What is a re-usable list? For example, I keep a list of items to consider packing when I go on a trip and things to do before I leave. I have one of these for business trips and one for vacation. Each time I plan a trip, I copy the re-usable list and customize it for the particular trip. I print it out and keep it handy as I prepare for the trip. This keeps my family organized, too.
- In my client project list, I keep basic information about each client: names and phone numbers of contacts, mailing address, driving directions, meeting notes, questions, and action items. If it is a large project, I put it in a separate document from my main list. I keep an up-to-date printed copy in a portfolio that I take with me to all client meetings.
- I’ve found that writing things down helps me to stay focused. Even if I don’t refer to the list, I remember more.
- I also make liberal use of Post-Its. I’ll jot things down as I work on the computer. At the end of the day, the slips get discarded, if the item has been handled, or the item goes into my master outline.

Contacts, Calendars, and Related Information

I never used a Day Runner. It was too bulky to carry around. Nowadays, I don’t use a PDA. Entering information on the tiny keyboard is awkward for me, and I am afraid I will lose it. Instead, I always have my laptop with me at client sites.

As soon as the first database program for personal use became available about 20 years ago, my husband/business partner and I built a database to keep track of names, addresses, and phone numbers. This has evolved over the years into a shared FileMaker database that we can access from the various Windows and Macintosh computers in our home office. I also carry the database around with me on a flash memory device. It has some unique features that commercially available contact managers do not have, and we have enhanced it to support a variety of applications. For example:

- We designed a normalized, relational structure so that various organizations, people, addresses, phone numbers, E-Mail addresses, web site references, etc. can be related to each other in an infinite number of ways. If two or more people share an address, we enter the address data only once. Multiple phone numbers and E-mail addresses are accommodated without limit. We can export this information in a variety of formats.
- We connected the contact information to a list of our accounts: bank accounts, credit cards, Internet shopping accounts, etc. If a credit card is ever lost or stolen, we have instant access to the right phone number.
- We built a time-tracking component to document the hours spent for our clients. The database automatically produces progress reports and invoices which are linked to the appropriate contact information.
- We can generate customer letters and E-mails as well as mailing labels for Christmas cards.
- We use a calendar component to track dates for each member of our family, with the ability to export the information to the To Do List, as noted above, and to a printed calendar format. I print the calendar for my husband and my 14-year old grandson. This has reduced the number of “What time is hockey practice?” questions that I get.

(Continued on next page)

Consulting Matters always welcomes newsletter article submissions. If you have an article that would be of interest to the computer consulting community, send your article to:
newsletter@iccaderval.org.

MS-Word or plain text is preferred. Article submission deadline for the September Issue of *Consulting Matters* is **October 22nd**.

From the Secretary

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- We track software serial numbers and technical support phone numbers and web addresses.

I realize that building a custom database is not practical for everyone. Off-the-shelf products are suitable for many people. Our database approach has allowed infinite flexibility to customize it for our own needs. We've used components of the design for client projects. And, it keeps our FileMaker skills sharp.

Whatever tool you use, keeping the information up to date is key. I am very conscientious about entering new information, but the obsolete information stays there forever.

Now, if I could just figure out how to synchronize my cell phone...

Money

I have always liked to keep detailed track of the money that we spend. Software is key to saving time:

- I use MYOB to track both personal and business spending. Since it does the math automatically, balancing the checkbooks and credit cards is a breeze.
- I have the software set to back up every time I quit the program.
- I pay most bills online, by check/debit card, or by automatic deductions. I write very few paper checks.
- When I sort through the mail, bills to be paid and other paperwork go into a stand-up file on my desk. Once a week, I go through it and enter the information into MYOB, pay the bills, etc.
- I enter the total amount of each invoice created by our database into MYOB for further tracking of business income
- I print a checkbook register each week, as an additional backup. At the end of the year, I print out the whole year and throw the weekly printouts away.
- I store all paper receipts in a box that slides under my desk (the lid of a copy paper box is the perfect size). At the end of the year, I sort through it in preparation for taxes. Business receipts go with the tax papers in a filing cabinet in my office, house-related receipts into a filing cabinet in my basement. Unimportant receipts are discarded.
- I do my own taxes with TurboTax. The time-consuming part is keeping the records during the year. If that is already done, preparing the return is easy, as the software guides you step-by-step and covers every detail.

Client Project Organization

Here are some simple things I do to keep my client work organized:

- I keep meeting notes and ongoing list of issues in my master "To Do" List as described above. I take notes at most meetings on paper, but transfer the key details into the digital list. The notes are filed as noted below.
- I keep digital documents and other files for each client in separate folders on my hard drive or on a network drive. Each folder is subdivided into appropriate administrative and technical subjects.
- I back up the information for each project together on physically separate drives, or on zip disks or CDs.

[\(Continued on next page\)](#)

Join the ICCA!

Become a part of the region's premier association for Independent Computer Consultants.

Membership rates are:

- * \$100 Local Chapter Dues
- * \$175 National dues for 1 person firm
- * \$225 National dues for 2-9 person firm
- * \$275 National dues for 10+ person firm
- * \$25 National Processing fee
(1st time only)

This Translates to:

- * \$300 for a first-time 1 person firm
- * \$275 subsequent years for 1 person firm

Call **610-394-9090** to request an application, or fill out membership application on line at www.icca.org

From the Secretary

Continued from page 4

- I also keep printouts of important E-mails and documents in labeled folders. I store these in filing crates or cardboard storage boxes that I can move them in and out of my car if necessary.
- At the end of the project, I review the accumulated zip disks or CDs and keep only what is necessary. I also discard most of the paper at that time, except the most recent version of deliverables.
- I maintain generic material for use in contracts, proposals, and technical documentation, and outlines for various types of documentation.
- When working on documentation, I use a quality assurance checklist to make sure that each proposal or deliverable is complete and professional.
- I use templates, re-usable components, and other tools for building database designs and application software. (This is a subject for another article.)

Paper and Other Clutter

My most frustration comes from dealing with paper and other physical clutter. Here's what I try to do, although I admit that sometimes it piles up:

- I hate filing paper and almost never get items put away or thrown away as soon as I am done with them. Instead, I have created space for several "holding" piles – one for each client, one for household papers, one for ICCA, etc. When the piles get too big, I force myself to deal with it.
- When I add paper to an existing file, I go through the file and discard what is no longer needed.
- Junk mail, discarded envelopes, old paper files, go right into a recycling bin under my desk. I've trained my grandson to empty it and take it out to the curb on recycling day.
- I've always liked mail order shopping, and now I shop a lot on the Internet. I still like to keep the printed catalogs from my favorite stores. I try to keep these filed, keeping only the most recent one from each store, in alphabetical order.
- I don't keep software documentation and CDs in their original boxes. These take up too much space. I put any manuals (either provided by the vendor, or printed from the CDs, double-sided and bound) on a bookcase in alphabetical order by software title. I put CDs in jewel-cases in CD racks, in the same alphabetical order. If the CD didn't come in a jewel case, I use an empty case with a label made out of correction tape on the edge. I put loose paper in a file labeled with the vendor name/software name. Passwords, serial numbers, and technical support information is logged into our database. I also put a label on the CD case with the serial number, if it is not already there.

All of these techniques take time to implement, but in the long run, they save me time when trying to find things and keep me on top of things that need to be done.

Do you have techniques that help keep you organized? I'd like to hear them. E-mail me at CindyCole@ccam.biz, or better yet, share them with the ICCA members' forum.

Meet our Sept 9, 2004 Meeting Sponsor



Todd Welch, Merrill Lynch



One of the programs offered by Merrill Lynch is the
Fee Waiver for Life Program

To qualify for a fee waiver for the life of the account, clients must deposit or transfer \$50,000 or more to a qualifying account and keep the money there for one year. Deposits can be made in a lump sum or in several deposits totaling \$50,000 or more to one account. Traditional IRA, Rollover IRA, Roth IRA, SEP and SIMPLE accounts qualify.

For more information on this and other financial management programs, contact
Todd Welch
Merrill Lynch
Financial Advisor
Global Private Client Group
(610) 687-7573
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October Tech Calendar

5 - Oct

IEEE Consultants Network
What IEEE is doing about the loss of
jobs in the technology sector
Sheraton Hotel
36th & Walnut
6pm - 9pm
<http://www.phila-ieee-consultants.org/>

8 - Oct

Network of Women in Computer Tech-
nology (NWCT)
Women IT Business Owners and Their
Stories: A Panel Discussion
5:30-9:00pm
[Adams Mark Hotel](http://www.nwct-philadelphia.org/)
<http://www.nwct-philadelphia.org/>

14- Oct

ICCA Del Val Chapter Meeting
Growing Your Business
Melvin B Payne, President - Knowledge
& Success, Inc
Holiday Inn Select
Claymont, DE
6:30 PM - 9:30 PM
www.iccadelval.org

27 - Oct

Delaware Valley Computer Users Group
Project Management Mistakes!
Jim Carty, President - IS Value Corp
Williamson's Restaraunt
City Line Ave, Bala Cynwyd, PA
Meeting information:
www.dvcug.org

If you hear of an event that
would be of interest to our
members, send the meeting
notice to
newsletter@iccadelval.org

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