

**Berg Kaprow Lewis**

Getting the most out of your PC

If you have a PC in your office that you only use for running out invoices, writing the occasional letter and browsing the Internet, you could be missing out on substantial business benefits that would cost you little more than a modest investment of time.

With some planning and the right software, even the most basic of office PCs can perform some powerful business functions. This briefing covers:

- Evaluating your needs.
- Accounting and communication.
- Databases and marketing.
- Getting help.

1 Questions and answers

Assess what you want to achieve for your business and then see if you can use your PC to get it. A PC only does what you tell it to do, so you must be clear about your aims.

1.1 Identify and **prioritise** activities that could be streamlined. These might include:

- Routine, repetitive tasks where efficiency can be improved. For example, simple book-keeping or fully fledged management accounts (see **3**).
- Communication. For example, using the Internet to speed up dialogue with customers and suppliers (see **4** and **5**).
- Tasks where timely information will help you to make better business decisions. For example, targeting your marketing at a defined group of customers (see **7**).

1.2 Look for **new opportunities**.

- For example, using the Internet to reach markets worldwide (see **4**).

1.3 Find **tasks** that you could not undertake, or would have to outsource, that may be possible using your PC. For example, personalising mailshots (see **7**).

2 Efficiency

There are two common elements that play a large part in keeping your PC-use efficient, whatever the task: software and standardisation.

2.1 Check you have the **right software** to do the job. For example, although you can use a spreadsheet for book-keeping, specialised accounting software will make it

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easier to handle more advanced tasks and generate useful management reports.

- But be selective: the most powerful software may not be the best solution for your business.
- The software you choose is vital, so do not be afraid to ask for help (see 9).

2.2 Create templates.

- These provide a head-start on creating any kind of new document. For example, a memo template can include the memo headings and set up a standard page layout, typeface and so on. Or you could create a standard reminder letter to send to customers with overdue invoices. You only need to enter the customer's individual details rather than retype the whole letter.
- Documents such as a standard price list can be easily updated, by changing the prices without needing to retype all the product details.

Gaining control

While a mouse is a useful and easy-to-use tool, using shortcuts on your keyboard can save time. The commonly used shortcuts are activated by holding down the CTRL key (situated at the both the bottom left and right sides of most keyboards) and adding another keystroke.

- CTRL and A — selects all the items in the active window.
- CTRL and C — copies the items or items you have selected and temporarily stores them.
- CTRL and V — pastes whatever you have copied using CTRL and C.
- CTRL and N — displays the New dialog box in whichever program you are in.
- CTRL and O — displays the Open dialog box or opens a highlighted file.
- CTRL and P — displays the Print dialog box for whichever program you are in.
- CTRL and Z — undoes a previous action. You may be able to retrace more than one step, dependent on the program and your individual settings.
- CTRL and S — in most programs, this saves the active document.

Each program has its own keyboard shortcuts: check for these in the program's help file or manual.

3 Faster finance

3.1 You can **automate** basic book-keeping.

- Simple spreadsheet software can automatically calculate totals.
- Specialist accounting software can also handle VAT calculations.

3.2 The right software can reduce the burden of **year-end accounting**.

- By providing better information for your accountant, costs and delays can be reduced.

3.3 You can generate useful **management information** automatically through your accounting software.

- For example, improved budgeting and analysis of performance against budget, automatic production of aged debtor and creditor lists or profitability analysis by product or department.

See Choosing accounting software.

4 Share information

4.1 **Email** can be used to communicate quickly and inexpensively.

- You can send contacts messages without interrupting them with a phone call.
- Response times are shortened as customers and business partners now expect you to be able to respond quickly.
- You can automatically send an email to a group of contacts at the same time.
- You can send emails internationally at no extra cost.
- Email can be used for internal communications and information-sharing. See **Email**.

4.2 You can create a **website** to make information about your business freely and easily available to potential customers.

4.3 To improve internal communication, you can create an **intranet**. (See **Intranets**.)

- You can publish information (such as key policies) on an intranet, an in-house version of the Internet.
- Employees can view the information using a standard web browser.

“Ignore the ergonomics issue at your peril. A computer operator's feet should be supported (to avoid strain on the back). Shoulders should be relaxed, the angle of the elbows at about 90 degrees, with the forearms and wrists in a straight line, while fingers rest gently on the keyboard. Eyes should be level with the top of the screen, to reduce neck strain.”

Georgina Field,
Shell

“When using your computer, one of the most overlooked issues is training. The way forward is to train people the 'short cut' way to complete their regular tasks. It takes half the time, is easily remembered and produces instant and measurable results.”

Grant Eagle,
Performance Improvement Learning

5 Speedy communication

Do you electronically connect with the outside world as much as you could? You could miss a competitive advantage and ignore potential efficiencies if you don't. As electronic communication becomes more widespread, customers are increasingly becoming used to speedy information transfer.

5.1 Sales support via email is fast and inexpensive.

- Queries to and from customers can be dealt with quickly.
- You have a permanent record of what you have said.

5.2 Managing your suppliers through email can save time and ordering through the Internet can save money.

- Email requests to suppliers should be dealt with more quickly.
- Many suppliers offer discounts on orders placed through their websites.

5.3 Communicating electronically with your accountant and bank can have significant benefits.

- Make sure any accounts software you use is compatible with your accountant's. This will make communication between you faster, more efficient and help control costs.

- Electronic banking offers more immediate control of your finances. Electronic services are generally available 24 hours a day.

You can control exactly when payments are made, rather than wait for a supplier to cash a cheque. Transaction charges are lower.

Ask your bank for advice on what you need to get started.

5.4 If your business needs to transfer data regularly, you can make full use of an Internet connection.

- Small files can be transferred by email.
- Larger files can be accessed from outside your business if you set up an FTP server. This is an area of your computer people can connect to that you define using the Windows operating system. Customers can either download files from it or place files on it for you. You will need a fast, always-on Internet connection to use it effectively. See **Going online**.

- For more demanding IT-based work that requires online collaboration, consider an extranet. This allows outsiders onto your PC through an Internet connection. Consider security carefully when setting up an extranet. See **Security and the Internet**.

5.5 You can make cheap international calls through your PC and Internet connection.

- You will need some additional hardware and software. The choice depends on your existing phone or Internet connections, the size of your business and how many calls you want to make simultaneously.

6 A central database

6.1 Creating and using databases can help you better manage your business relationships.

- A database retains knowledge in your business by storing it in one place.
- A wide variety of database software is available. You may already have some, as professional versions of Microsoft Office include a database program called Access.
- Record key data about customers in

“A computer is now a tool for communication as much as for administration. Information transfer, faxes, emails, telephone calls, web cams — there are no limits.”
Peter Heskett,
www.ok-ya.com

Linking together

Every business will benefit from linking its PC to other devices. Networking provides several specific, practical advantages.

A You can **share** files.

- This is essential if several people need to use the same database.
- It is also useful if you need to check letters or reports your colleagues have completed.

B You can share **resources**, such as printers or scanners.

- The time spent setting up the network will be dwarfed by the time you would otherwise have to spend connecting and reconnecting devices.

C You can **communicate** directly from your PC. For example, internal or external email.

The kind of network you will need largely depends on the size of your business. See **Networks and communications**.

“When specifying a database, think big. Try to imagine the business in five years' time and the information you would need then.”
Ian Necus,
Promissor

your database. For example, contact name, address, telephone numbers, email address, what they have ordered from you, how they heard about you and details of every contact your business has with them. This will help you and your employees to have fast access to the right information when dealing with customers.

- You can also use your database as a powerful sales and marketing tool. See 7.
- You can also use a database to manage details of suppliers and staff.
- Keep your database as up to date and accurate as possible. The more errors or outdated pieces of information on your database, the less useful it will be.

6.2 Link as many functions to your database as you can to avoid duplication of effort.

- For example, make sure your accounts software can connect with your database so it can automatically generate reports of overdue invoices, or listings of your top customers.

7 Marketing support

The cost of attracting new customers is significantly higher than retaining existing ones. Use your PC to keep your existing customers better informed — and happier.

7.1 Use your database to identify what interests your customers and what they buy.

- Your database software should be able to select customers according to criteria that you specify.
 - Mailshots targeted at specific types of customer can be more successful than blanket campaigns.
 - Email marketing can also be successful and cost-effective.
- See **Marketing with your database**.

7.2 Use the database to store all your customer information so anyone who works with you can access it quickly and easily.

- This can help improve customer service, although it is essential to keep the information up to date and accurate.

8 Staff and PCs

PCs are only as good as the people who use them. If you are going to introduce PC-based systems, you must also involve employees.

8.1 Discuss your plans. Involve:

- Employees who will use the system, and who understand what the issues are.
- Customers and suppliers who will be affected.

8.2 Plan the rollout.

- Introducing too many changes at once can be chaotic.
- Starting with relatively simple software (or gradually implementing more complex systems) usually works best.
- Although you may be introducing more software over time, plan how the whole system will work from the outset.

8.3 Arrange training.

- Plan a gradual development of skills, focusing on the most important tasks.
- Encourage continuous learning on the job, rather than just a one-off training course.

8.4 Learn from problems and mistakes.

- If an individual continually has problems, consider additional training.
- If a system continually causes problems, change it if necessary.

9 Getting help

Unless you are an expert, you are unlikely to get the best out of your PC without help.

9.1 Help yourself.

- The best training you can get is learning how to use mainstream software packages' automatic help features.
- Help is often available through the Internet, either from the software publisher or from communities of experts.

9.2 Get help early.

- The most cost-effective help is usually having an expert set up your system.
- Many businesses find help essential for setting up more complex programs such as databases.

9.3 Find the right sources of help.

- Suppliers can be helpful, particularly if they want to build a relationship with you.
- Business Link have IT advisers who can put you in touch with specialist suppliers and consultants (0845 600 9 006 or www.businesslink.gov.uk).

Expert contributors

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Further help

There are other Directors' Briefing titles that can help you. These briefings are referred to in the text by name.

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