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THE
ULTIMATE GUIDE
TO COLLECTING
— & —
USING BUSINESS
INFORMATION

INTRODUCTION

New technologies are not always embraced with open arms. When news of Alexander Graham Bell's invention of the telephone reached the UK, the engineer in chief of the British Post Office wasn't impressed. "The Americans," he said haughtily, "have need of the telephone – but we do not. We have plenty of messenger boys."[1]

Technological innovation has never been faster than in 2014. Smartphones and tablets continue to pack more power and functionality with every year. There's a fundamental differentiator between early adopters and late adopters. Late adopters fail to see how technology can improve a process. Early adopters ask themselves, can this be better?

With collecting and using information, the answer is yes. Companies with paper based systems struggle to collect, use, and store the information. It's easy to have errors, miss information, or lose it entirely. Paper based systems cost companies thousands of dollars and hundreds of hours over the long run.

[1] Denwa Communications. "Telephone Quotes, Funny and Amusing" 10/20/13. http://blog.denwa.uk.com/telephone-quotes-funny-and-amusing/ 3/17/14

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INTRO

In this ebook, you'll learn how to improve your business by collecting and using information more efficiently. Technology has made collecting and using business information easier and cheaper than ever before. Whether you're in retail, construction, or child care, there are lessons and tools for you to use today. Not only can you improve your business, but you'll save time and money along the way.

This isn't about cookie cutter solutions. No two businesses are the same, even in the same industry. Instead, we'll provide a look at how small and medium size businesses collect information today, and ways to improve upon it. We'll show you the options available and why certain ones are better for some businesses than others.

The 21st century is the century of information. The businesses that can collect and use that information to their advantage will see the most success. You don't need to be Amazon or Google to harness the power of data. No matter what your field or expertise is, this book can help you join the leading edge of innovators today.

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Nobody Dreams of Paperwork
by Renwick Scott

> *"It's a joke in the zoo business... the paperwork involved in trading a shrew weighs more than an elephant, that the paperwork involved in trading an elephant weighs more than a whale, and that you must never try to trade a whale, never."*
>
> *—Yann Martel, Life of Pi*

What do people dream of when they spare a moment to think about the future of their work life? If you were to ask your friends, co-workers, or employees, you would hear a variety of answers. Every one of us has our own individual goals and aspirations in mind, yet if there is one thing which is consistent across workers everywhere, it might be this: nobody dreams of paperwork.

If you ask a child what they dream of being when they grow up you'll hear an array of responses. Astronaut, firefighter, lawyer, teacher, scientist, the list goes on. They certainly save no thought for expense reports or time sheets. Even years later, after working their way through the educational system, college graduates manage to hold onto their hope for a satisfying work life. They prefer words like fulfillment and purpose instead of reliability and regimen. Grads dream of finding work that will let them realize their value and their potential.

Even if you ask workplace veterans about what they would like to see less of, paperwork would rank high on that list. Once information goes down on paper it has only two inefficient futures: frozen in a drawer where it is never looked at again, or digitized years later in a computer database. Studies clearly show that people want tasks that are creative and challenging[2]. The drudgery of paper only embitters employees, killing their motivation and incentivizing time-wasting inefficiency.

It's not surprising that workers hate paperwork, as paperwork is not for really for them. Things like timesheets and work orders are primarily management tools designed to help management understand where resources are being spent and where they need to be allocated for the future.

Even here, rather than being aided by paperwork, bosses often find themselves buried under it. Managers want to bridge communications gaps, slash inefficiencies, and react to changing conditions. They don't relish the task of endlessly signing off on purchase orders and time-sheets. Perhaps even more than their employees, managers dream of being free from the endless chore of paperwork.

[2] Wikipedia. "Work Motivation: Work Engagment" http://en.wikipedia.org/wiki/Work_motivation#Work_engagement 3/10/14.

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Do modern businesses need things like timesheets and invoices to keep track of their affairs? Of course they do, but transmitting this information in the form of ink on flattened plant fiber is an insult to efficiency. Paperwork is not work; it's what occurs between work and often gets in the way of work. We must do better than this.

There are countless reasons that modern businesses must go paperless: increasing employee efficiency, accessing up to the minute data, enabling next generation analytics, reducing materials costs, the list goes on. The most important reason is to free your employees from the indignity of inefficiency. Every minute spent filling out paper forms is a waste of worker time and enthusiasm. Removing the inefficiency of paper from the workplace will help your businesses and employees reach their work dreams.

Nobody dreams of paperwork, so let's get the paper out of the way and get back to work.

About the Author

Renwick Scott writes the Thoughtinfection.com blog. Thought Infection seeks to explore where science fact meets science fiction in a world of accelerating technological progress.

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EFFECTIVELY COLLECT BUSINESS INFORMATION

“ *If you don't know what to do with many of the papers piled on your desk, stick a dozen colleagues' initials on them and pass them along. When in doubt, route.* ”

—Malcolm S. Forbes

Why You Should Skip the Information Middle Man

As a business, collecting information is crucial to knowing everything from basic profits and losses to future cost projections. If there are question about customer demographics or the reliability of equipment, everyone looks at the data.

For a century, if not longer, organizations have collected that information on paper. Time cards, inventories, receipts, even taxes have been filed on paper. Paper could hold information and transmit it across distances more accurately than the human brain. It was easy to carry and small enough to store.

However, paper has extra processes that are no longer necessary. For instance, let's say you fill out a time card every day. You clock your workers in and out. At the end of the week you have to convert that information into your database. Paper forms force you to enter

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the same information two times, once on paper, once into your database. Manual entry is prone to error. If you only make a mistake 1% of the time, manual re-entry would raise that rate to 10%[3]. This creates additional opportunities for error and wastes precious time and money for your business.

Today, paper is a middle man demanding your time, your money. What does he offer in return? Errors and headaches.

With the rise of new technology you can take steps to eliminate this paper irritant as it relates to many ways of collecting information. Cloud storage, a backup storage of information based on the Internet, combined with the Internet and smartphones can create a new, more efficient process.

Mobile data collection software enables information to be easily collected on mobile devices, so your employees can fill out forms and collect information anywhere. With mobile data collection, information is safely stored in the cloud. By using APIs, webservices that specify how different software interact with each other, it's possible to easily integrate your data with your own systems like Salesforce or QuickBooks.

In plain English, this system provides major productivity benefits. No longer do you have to wait hours or days for the information to return to your office and be entered into your database. Every finished form is immediately available in the cloud, so you can do things like invoice faster and order new business supplies faster.

Beyond speed, skipping paper will save you money. Mobile apps remove hours of staring at a screen, slowly entering the data a second time.
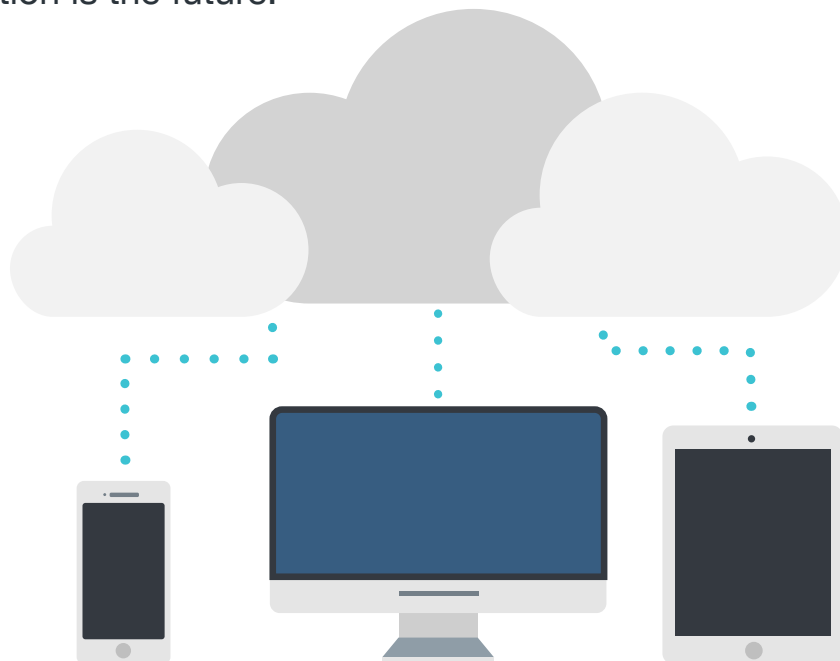
[3] Spira Data Corp, "The Impact of Keystroke Errors on Your Business." 8/10/10. http://www. spiradata.com/blog/2010/08/the-impact-of-keystroke-errors-on-your-business/. 3/10/14.

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Every hour of boredom saved is money saved, too. Some businesses have been able to reallocate multiple employees away from data entry and towards marketing and other areas that grow their businesses.

Besides data entry, organizing paper forms requires further time. Each paper document on average takes 18 minutes to find[4]. With mobile apps, all submissions are available and easy to search in the cloud. Businesses that have gone mobile easily organize and find their documents within seconds.

In addition to being able to access data faster, mobile apps expand data collection. What kind of information can paper collect? Signatures, written text, checkboxes, maybe an address or two. By using smartphones and tablets, you can harness the full power of technology. Calculations, photographs, signatures and GPS capture are all possible with mobile data collection. All of these are collected in one easy to read and share PDF.

In 2014, mobile data collection is helping businesses make new strides in sharing information and facilitating communication. While paper was a reliable option in the past, compared to new technological innovations, it simply doesn't measure up. Throughout this chapter, we have multiple pieces to explain why mobile data collection is the future.

[4] Paperless Project, "Facts About Paper". http://www.thepaperlessproject.com/what-are-the-facts-about-paper/ 1/2014.

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PAPER vs. MOBILE

$80
Annual cost of paper per employee*

$600
Annual cost per employee,
unlimited voice and text**

Filing Cabinets

$2182.62
Annual Cost owning and operating a
standard five-drawer file cabinet

Cloud Storage
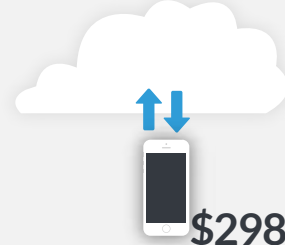
$298.88
Annual Cost for 1 Terabyte on mediafire

What's Collected?

Handwritten Notes

Manual Calculations

Checkboxes

Signatures

Calculations

Photos

Drawings

Signatures

GPS Location

Barcode Scanning

📄 Messy carbon copy

🗃 Overflowing filing cabinets

☹ Requires additional data entry

📄 PDF

✉ Email

☺ No Additional Data Entry
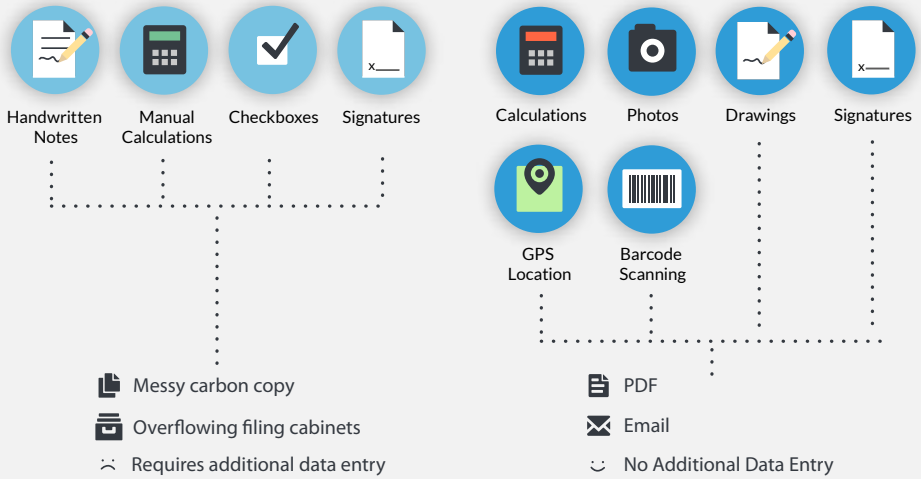
Average cost of one data entry specialist
$27,911

Canvas app subscription
$210/Year

SOURCES
http://www1.salary.com/Data-Entry-Clerk-I-Salary.html
http://www.nd.gov/itd/service-info/cost-storing-paper
https://www.mediafire.com/upgrade/#space

*Does not include the cost of printing supplies.
**Business consisting of 10 employees.

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5 Epic Data Collection Fails

We've all had these moments. You cringe looking back at the blunders, or the mistakes you could have easily avoided. But if everyone has done them, is it really just human error at play? Here are our top blunders, and why they often involve more than just human error.

1. Was it 45 Baker Street or 45 Baters Street?

You have workers in the field. To save time and gas, you try to send them delivery addresses via phone or radio. Only problem? The signal cuts out and your field worker can't quite hear the address. So they go to the wrong location. You figure out the mix up, and your worker gets to the client's location...just an hour late.

This common mistake isn't just bad for your efficiency, it's bad for your brand. You lost an hour of billable time, and your client's trust. Both affect your bottom line. This isn't due to bad workers, but a communication system prone to errors. Blame the message system, not the messenger.

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2. What do you mean we don't have it on file?

Just about every business have forms that employees fill out every day. Most days these forms are tedious, yet run smoothly. But one day, something goes wrong. Maybe it's a fire, or an employee gets hurt. Would a fire ruin your records? If the employee threatens to sue, would you be able to find this form? Today, 70% of businesses would fail in three weeks if they had a catastrophic loss of paper due to a fire or flood[4]. Businesses are taking a chance that they'll stay safe.

The nature of paper forms makes them both easy to damage or lose, or hard to find. On average, it takes 18 minutes to find a paper form[5]. Even the best businesses misplace or lose files: a recent survey found 7.5% of paper documents are lost and 3.5% are misfiled. Together, 11% are lost to businesses[6]. Even in the best case scenarios, paper forms cost you time to find.

[5] Paperless Project, "Facts About Paper". http://www.thepaperlessproject.com/what-are-the-facts-about-paper/
[6] Lavelle, Ronan, Real Business. "Only 1% of EU Businesses Achieve a Paperless Office". 1/17/14. http://realbusiness.co.uk/article/25232-only-1-of-eu-businesses-achieve-a-paper-less-office

3. Brian filled out the on-site fire inspection form on Friday at noon, but he also posted pictures from the Lakers game on Facebook...at 12:30

We want to believe our employees are always right where they say they are. Sometimes it can be a little too tempting to cut corners. Paper forms give you no way of knowing where they are when they fill out important forms. Can you be sure that your inspections and checklists are being completed on-site?

A number of potential problems could arise from this uncertainty. You could be missing only small issues with a work site. Maybe that only costs you a few hours of extra work. But what if you miss a larger issue, a safety violation? That kind of gaff could leave you open to lawsuits down the road.

4. Does 12 * 6 = 72 or 78?

Adding up numbers in the field can be a chore. But if you get it wrong, you're in big trouble. Go too low and you'll leave money on the table. Go too high and you'll risk being caught and losing business.

"Arithmetic is being able to count up to twenty without taking off your shoes."

—Mickey Mouse[7]

Doing a bunch of calculations in your head is tough any time. But when you're in the field, trying to be quick and efficient, adding up all the numbers takes extra time.

[7] Math Facts. "Funny Math Quotes" http://www.kidsmathgamesonline.com/facts/funnymath-quotes.html 3/12/14

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5. Coffee Spilled and Data Lost.

Sometimes, Mother Nature is not your best friend. Coffee spills, gusts of wind, messy cars, even rain can ruin a perfectly good report. With paper forms, that means all your hard work can get lost in a moment.

Mobile apps help protect your information. Whether you use a ruggedized or consumer smartphone, all of your reports are sent straight to the cloud and stay safe. Even fragile smartphones have great protective cases now. These can protect against being dropped, shocked, or landing in dirt or water. Can your paper forms give you this kind of protection?

More often than not, your work goes smoothly. You have a strong team, and get great data. But even if that fails just 5% of the time, it costs you and your business. Most data collection failure isn't your fault; it's the system you use.

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4 TYPES
OF DATA COLLECTORS

You care about what type of data you collect, but have you thought about the type of people collecting your data? Here are four types of workers you may have, and some of their particular needs.

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01. THE SCIENTIST
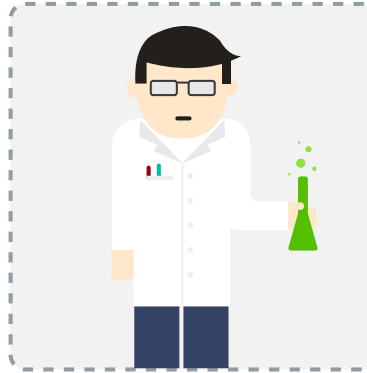
THEY ARE
Detailed, meticulous about the facts. Terse, forget qualitative details.

IDEAL FOR
Quantitative data and tasks requiring precision.

MAY NEED
Examples for text descriptions expected from them. Detailed explanation of how mobile apps work.

02. THE STORYTELLER

THEY ARE
Verbose, animated, forgetful.

IDEAL FOR
Qualitative data and working with people.

MAY NEED
Required boxes, reference data, additional help on learning new technology.

03. THE HARDWORKER
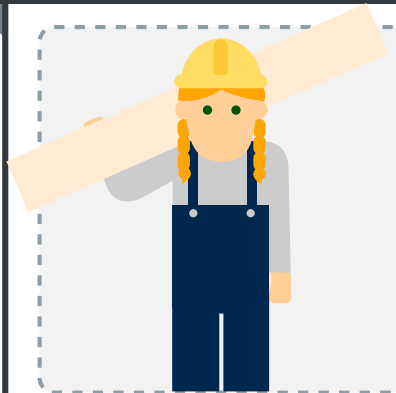
THEY ARE
Hardworking, knowledgable, detest busy work.

IDEAL FOR
Field work and specialized tasks.

MAY NEED
Pre-populated fields, checkboxes, and dispatch.

04. THE KLUTZ

THEY ARE
Hardworking, always stumbling onto problems. Spilling coffee and losing forms.

IDEAL FOR
A plastic bubble.

MAY NEED
Protective case around their device.

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Conducting a Paper Audit
by Samantha Voelkel

Samantha Voelkel is a partner of Canvas and owner of Black Bee Mobile.

You are starting to see the problems of collecting information on paper and are now excited to take your business paperless. While you will still collect much of the same data, you will also make some changes as you go paperless. Before you dive in, it can be extremely helpful to take some time auditing and reviewing the information you currently collect with paper forms, Word Docs, PDFs, and Excel Spreadsheets before converting them to mobile apps.

Here are a few steps to get you started:

Start Small

Depending on the size and type of your business, the number of forms you have may be overwhelming. You don't have to tackle all of these forms at once. Start small and select one to two forms that you use most frequently. Skip any forms that need a wet signature or need to be notarized.

Good forms to start with include:
- Inspections
- Expense Reports
- Work Orders
- Checklists

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Be Organized

A well-organized business should already have a structured naming system in place for creating and saving documents. This allows you to search and find data quickly. So what's consistent across great filing systems? Organizations pick something easy to decipher and are consistent across files. Smaller organizations often choose A-Z filing system because it's easy to set up and takes minimal effort to maintain. Larger businesses or those with a wider range of documents often file by category or subject and then subcategories.

"Don't own so much clutter that you will be relieved to see your house catch fire."

—Wendell Barry

Your organization may already have a great filing system and want to keep it. Some companies look through their files as they switch to mobile apps. They ask, what information differentiates our files? Is it date and worksite? Is it a customer's name? In the long run, reviewing your form and deciding how to name your submissions will save you time searching for forms later.

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Think Mobile

Before building your mobile app, take some time to look over your paper form with a mobile app in mind. Slightly modifying your form may enable you to convert it into the best app possible. While both mobile and paper can capture information, filling out information on mobile is a slightly different experience in some ways than using paper and pen.

For instance, you may not have all your fields on one screen.This means you'll have to decide what information goes on which screen, like page breaks. Also, do you want people to easily skip to different sections of the form? Or do you want a linear experience? Perhaps you will want a table of contents feature. Are there any fields you need filled out each and every time? These fields can be made required in your mobile app.

Thinking mobile doesn't mean you have to keep all these notes in your head. You can edit the form you use now, or take notes directly on a paper version. This will greatly reduce the time needed to actually build the app.

Evaluate your paper form and think about how you might break it into screens to improve workflow. Name each screen, such as customer information, or order summary. At the end, you'll have a rough template for your future mobile app.

Consider New Information to Collect

By using a mobile app instead of a paper form, you can collect new types of information that may be useful for your business. Take a moment to look at what type of data this form collects. Mobile apps offers some features that can enhance your current paper version. You can include functionality in your mobile app to capture information like:

📷	Photos	✒️	Signatures
📍	GPS coordinates	✏️	Drawings
✔️	Checkboxes	🧮	Calculations
📅	Date and time stamps	📄	Summaries

Before building an app, review your paper form. Would any of these features help your business? Pictures can help provide extra validation for your inspections. Signature and GPS capture can be perfect for delivery confirmations. These are just some of the possible ways to enhance your forms and gather more data.

Switching to mobile apps expands your ability to collect data in new and exciting ways. By taking your time with a paper audit, your transition will be smoother and faster than if you jump right in. Whether you use reference data, calculations, or GPS capture, you'll have a great app that will help your business thrive.

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CHAPTER ONE TAKEAWAYS

- ‣ No one enjoys dealing with paperwork

- ‣ Filling out out, storing and searching for information using paper forms costs businesses time and money

- ‣ Paper forms are prone to various errors, undermining the quality of your business's data

- ‣ Collecting information isn't just about having people fill out forms, but knowing how and what data your employees collect

- ‣ Strategic thinking can help you transition from paper to mobile apps

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USING THE INFORMATION

"Anything that is measured and watched, improves. "
—Bob Parsons, GoDaddy founder

So you're collecting better, more accurate information. But what are you doing with it? Some businesses collect great information, but find it collecting dust. If businesses don't use this information, it can often be a drain of resources and energy with little to no return.

Great companies don't just collect information in smart ways. They also use this information to enhance their businesses. They leverage it to anticipate their customers' needs, create strong strategic plans, and find their own internal weak spots. Information can provide a wealth of important information, if you look at in the right way.

In this chapter, we introduce a few different ways for companies to use information to strengthen their businesses. From improved customer service to reduced redundancy, you can easily collect and understand your information to make better decisions.

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How Companies Use Mobile Apps to Track Employee Work

Whether you have two or two hundred employees, your business relies on their work for success. Passionate, motivated team players can be the difference between a company surviving and a company that's thriving. With remote or mobile workers, it can be difficult to know which employees are carrying their weight and which ones aren't. Mobile apps can help you track employee work in a few important ways.

Time Cards

For businesses in many industries, such as oil and gas, manufacturing, and construction, time cards are crucial for tracking not only employee time worked but also labor costs for projects. For decades, the most effective way to track these was with time cards.

Ensuring accurate time cards, however, can be incredibly difficult. If someone arrives late to a work site, for instance, site managers have to retrieve the paper form from their truck or office, note the employee's arrival time, and return the paper form. This cuts into the day's workflow and takes time. For many managers, it's easier to estimate when someone arrived on site than it is to report in real time.

Estimates can also lead to further problems with employees. Some may complain that they aren't being paid enough and should be paid more. Suddenly, you have to double check hours worked before sending checks.

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While time cards try to make tracking labor easy, they actually create extra hurdles for businesses.

Mobile apps make time cards easy. Open the mobile app on your smartphone or tablet. The app can have the time automatically entered. Even better, the company gets the information in real time, submitted to the office. The app can have the time automatically recorded, ensuring that the information is accurate. The information can be sent to the cloud in real-time and be made available to whoever needs access to it. Mobile time cards help businesses with hourly workers spend less on tracking employees and more on their actual work.

Tracking Sales Meetings

Many companies have salespeople who are on the road for days or weeks at a time, meeting with potential customers. You may have a few of these folks in your business, or you may have hundreds of them all across the United States, or the world. Tracking these meetings, and understanding how they go, along with many other related details, is vital to success.

On paper, this process is a huge time suck and hassle. The information can take days or weeks to return to regional or national offices. Even with this information, companies rely on sales employees to provide proof of the meetings.

This may work if you're able to follow up each day with a couple employees but why not track things more accurately?

With mobile apps, it's much easier to track these types of sales efforts. Salespeople can easily type in the information they wrote down previously, but also include validation. Time and date stamps can be automatically included every time the mobile app is opened. In addition, the salespeople can record their location not by writing the address, but with a GPS location capture. These fields cannot

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be manipulated by the salespeople. Going mobile has made gathering sales meeting information easier, consolidated to one database, and also more reliable for tracking and reporting.

Understanding Work Orders, Understanding Productivity

For field workers in the service industry, productive employees generate more revenue for a business. Tracking how many jobs each employee does in a week can be cumbersome and time consuming with paper work orders. They can also be hard to read, inconsistently returned to the office, and impossible to get in real time. For an HVAC business owner, paper forms make it time consuming to know which employees are productive and which ones aren't.

Mobile work orders create a system that's reliable, accurate, and accessible in real time.

HVAC companies use time and date stamps to show an accurate timing of when the job occurred. Some will also ask for a GPS location to prove that the technician was at the site.

Mobile apps enable this kind of data to be stored in the cloud, eliminating the need for manual data entry (and errors associated with this) and filing cabinets to store old paper forms. In addition, the office accesses these forms in real time. Thus, employers can know how productive technicians are that day, rather than a week or two weeks after the fact.

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Ensuring Quality Inspections

One large organization working with Canvas does quality control inspections across the United States. Depending on the site, inspections must occur on a weekly, monthly or quarterly basis. With paper forms, some employees filled out the forms without visiting the sites. This organization needed a system to assure that these sites were inspected and kept safe.

Mobile apps allow this company to ensure quality inspections throughout the country. They use time and date stamps as well as GPS location to validate that inspections occurred at the appropriate site as well as correct time and date. This organization also uses photo capture to report any issues. Not only do photos help with communicating problems, but also give visual proof of any issues.

Creating a system of accountability doesn't have to be time consuming or expensive.

Mobile apps help companies in a variety of industries do this while streamlining their current processes. Companies can hold their employees accountable, while also saving time and money.

Use Customer Data to Improve Customer Service

Customer service, whether in retail or day care, is crucial to your business. But what if you could move beyond simply responding to customers' needs? What if you could anticipate them? With new data analysis and customer service tools and technologies, small businesses can now uncover powerful data and trends that big businesses have access to. Here are some ideas to help you improve.

It is 6-7 times more costly to attract a new customer than it is to retain an existing customer.[8]

Who Are Your Customers?

You may have an overall idea of who you work with, but do you know who they are and where they're located? With mobile apps, you can easily collect simple information to give you a better understanding of your customers. For instance, if you're a service-based business, collect the locations of houses or businesses you visit. Combine these points on a map to see where you work, and where you don't. The open areas could be ripe for your growth, and the overall data can be used to improve your scheduling and efficiency.

If you're in day care, ask information from the families you work with. Do you work with families where both parents work? How many kids do they have? How did they learn about your day care? No matter what industry you're in, you can find out important information from your customers. This will help you understand your customer profile, and how to reach out to prospects.
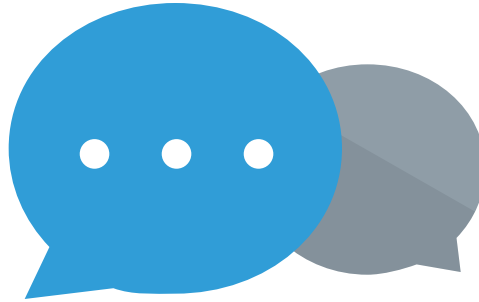
What Do Customers Want?

A 10% increase in customer retention levels result in a 30% increase in the value of the company.[5]

You have a thorough customer purchase history already in your system. Every transaction records the services you provide. The flip side of that? You have a long history of what your customers want. While this data can't predict the future, it can give you better estimates for what your customers want. Even better, you can use this to incentivize loyalty and future purchases.

For instance, let's say you're a wholesale food distributor. By going through your transaction history, you see that every April you have a surge in demand for strawberries. You could create special discounts around those strawberry sales to encourage larger orders, or repeat buys. With enough transactions, you can anticipate what your customers will want and when. This will help you prepare for the future, and deal with the day-day.

[8] Thornton, Kendall. Salesforce. "18 Interesting Stats to Get You Rethinking Your Customer Service Process" 8/14/13. http://blogs.salesforce.com/company/2013/08/customer-ser-vice-stats.html 3/10/14.

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Why Won't Customers Respond?

What you don't hear from your customers will tell you a lot as well. For instance, one pool maintenance and cleaning service was struggling to get customers' feedback. He would send long, detailed reports about their pools and add his notes about issues at the end of the report. But customers often wouldn't respond.

After talking with customers, he realized that they weren't interested in long detailed reports. If there were issues, they wanted to read that first. This information helped him make important changes. He streamlined his inspections, and added any notes on issues to the beginning of his reports. Now his customers not only see but also respond to these issues, making his follow up a breeze.

Are you struggling to hear from customers? This could be a user experience issue rather than a refusal to call. Quality experience doesn't just mean collecting numbers, but also listening to your customers' stories. Take time to speak with customers about their experience so you can find the issue. Then the changes you'll need to make will be clear. This process will save time for both you and your customers.

At the end of the day, your data can't tell you what to do or predict the future with 100% accuracy. Use your data to understand where you have come from, and where you are today. By understanding the past and present, you will have the best perspective to decide your future.

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How Warren Buffett's Investment Strategy Can Help You Use Data

Warren Buffett is really good at investing. Yes, this is an incredibly obvious statement, but what underlies his success isn't. His success doesn't just come from luck; Buffet is data-driven and follows a few key principles[9]. By focusing on the same areas in your business, you can help make it a stronger and more competitive.

Taking the Long View

> *"Risk comes from not knowing what you're doing."*
> *—Warren Buffett*

As a value investor, Buffet begins his search with a company's performance, specifically for shareholders. He looks for the rate that investors are earning on their shares, otherwise known as a Return on Equity (ROE).

Buffett cares not about one year of ROE, but five, ten years of data. He needs the bigger picture to get the most accurate view of a business. Only then can he truly understand the ROE.

As a business owner, you need the long view, too. You make both big and small decisions for your business every day. To make the best choices, you need an accurate picture. We all know that many factors can play into why your costs, sales and margins are higher or

[9] "Warren Buffet: How he Does It" Investopedia. 9/4/13. http://www.investopedia.com/articles/01/071801.asp 3/12/14

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lower some months versus others. Taking a longer view will give you the most accurate picture possible.

To get an accurate picture of your business, you need the right data. And this often means a lot of data. Aggregating large amounts of data can be slow and tedious with paper forms. Who has time to spend hours combing through those forms? You'll bypass all that work with mobile apps. When you go mobile, every submission goes straight to the cloud. There, it's safe, secure and easy to access at any time. Looking at five or ten years of data requires a simple search, not hours of work.

Back to Basics: Profits and Costs

Another reason why Buffett has been so successful is that he looks at the data on the business's fundamentals. Does the company avoid debt? Do they make a profit? Do the profit margins increase over time? Buffett looks for businesses that avoid high levels of debt and continually push up their profit margins.

We all know that these details are important, but it can be hard to trace some of your more invisible costs.

One client of ours realized that missing paper invoices was costing them $10,000 a month in revenue. Keeping detailed information of your costs and profits is essential in tracking the health and success of your business.

Mobile apps help you track those details quickly and easily. Paper invoices and receipts, are easy to lose or damage. Once again, the cloud protects your data from the Bermuda triangle of your car's backseat, or the dangers in your coffee cup. Later when you need to look at the information, you aren't confronted with a massive filing cabinet. Just a small search bar in your web browser, finding your form in seconds.

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Step Away From the Crowd

A major factor in Buffett's investing: Does the company provide a commodity? If so, he shies away. This decision comes down to the issue of differentiation. Companies need to stand out and be unique. If the business doesn't offer anything different in its industry, than not much sets it apart.
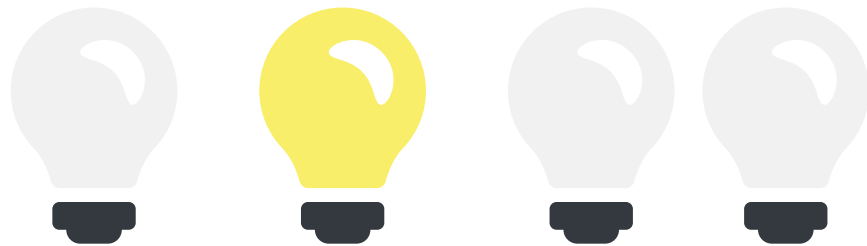
You may not have investors, but you need to know what sets you apart.

Why? Every company has outside stakeholders. Perhaps they are customers, maybe they are regulators or policy makers. You have to persuade them about your business, and what sets you apart. If you don't show people how you're different or better, you're just another product or service with a price tag.

You don't, however, need to reinvent the wheel to stand out. Going paperless can be a fantastic way to maintain your organization, and differentiate. With emailed receipts, and streamlined processes, your business will be ahead of the technical curve, and above the crowd.

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The pool maintenance and cleaning service company we mentioned earlier has been incredibly successful at using the Canvas mobile app as a business differentiator. He has multiple competitors in town. So why does he have a waiting list of potential customers? He has gone paperless.

Before, customers could easily lose paper receipts of their work. Today, every client receives an email after service, detailing the work done. With a mobile app, he is able to take photos to explain his work, and any needed repairs. Thus, his customers find it easier to understand any issues or needed repairs. Potential customers find his use of technology more professional as well. Going to a mobile app has saved him money, and attracted new customers to his business.

With a net worth of over $53 billion, Warren Buffett is widely regarded as the most successful investor of our time. Perhaps you aren't looking to invest in the stock market. But your business deserves your best insight and resources to make it the leader of the pack.

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Cut the Fat with Operations Data

The economy may be getting better, but it's no easy going out there. As the market opens to more and more competition from around the world, you are always looking for ways to make your business leaner. Are you stuck looking for new ways to reduce inefficiencies? The insight you need may be hiding inside your own operations data.

Product Delivered vs. Product Used

If you're in an industry such as manufacturing or construction, you rely on raw materials for your work. From cement to iron, these materials can be both expensive and perishable.

In the UK, the construction, demolition, and excavation industry sent 12.7 million tons into landfills in 2012 alone.[10]

[10] Hobbs, Gilli. CD& E Waste: Halving Construction, Demolition and Excavation Waste to Landfill by 2012 as Compared to 2008. Strategic Forum for Construction. 2012. http://www. strategicforum.org.uk/pdf/CD&E-waste-to-landfill-figures2010.pdf 3/12/14

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One way to do this is by comparing your product delivered to your waste management. With precise measurements at both delivery and removal, you can calculate your waste. Some waste is inevitable, especially in heavier industries. However, this data will give you a larger picture of the amount of materials you use and where you can cut back on your purchases. Reducing your waste will mean less purchasing costs, helping both the planet and your bottom line.

Reduce Your Routes

For companies in transportation & logistics, every extra route costs you in gas, a worker's time, as well as wear and tear on your vehicle.

Reviewing your routes and where they overlap can be a great way to figure out redundancy in your transportation.
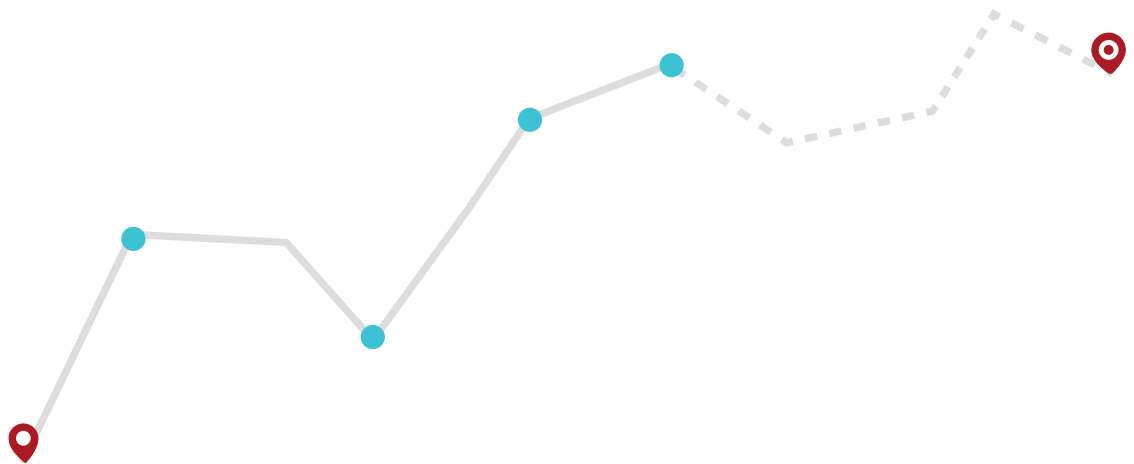
With GPS location capture, it can be easy to visualize these routes on a map. Perhaps you can consolidate two routes into one slightly longer route. Or, maybe there is a faster and more direct route between the departure and arrival stops. With automatic time and date stamping, you can even calculate the duration of the trip.

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Increased communication can also make your transportation more efficient. A light dispatch service will allow you to send delivery information to remote or field workers. A careful review of your routes can save you hundreds of gallons of gas, and thousands of miles of wear and tear on your fleet of vehicles.

Review Your Suppliers

How much are you spending on purchasing materials? How long does it take for your supplies to arrive? Are your suppliers responsive to your needs? These are just some of the questions to ask when thinking about the cost and benefit of working with your suppliers.

There are ways to answer these issues with quantitative data. You can gather this data from your purchase orders, delivery confirmation receipts, even reach out to your purchasing department with a survey. Ask questions about any issues or problems you have had in the past with receiving your orders. A cheap supplier is great on paper, but it may hurt your overall work and quality as well.

So Much More

These are just a few ways you could save money with improved operations data management. Better insights will allow you to make the most of your system, and run faster. Even if you only make small changes, you will be a more efficient organization.

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3 Simple Additions to Make Your Data Go Further

Are you already using mobile apps? You don't have to revolutionize your data collection to make it better. With a few tweaks here and there you can make your data go even further.

Light Dispatch for Clearer Communication

01. Many companies struggle to assign jobs to workers in the field. Paper, telephone, or radio: they all have their problems. Dispatch lets you send the information clearly and easily to your workers mobile app.

Automate It

02. Use the data you have to be even more efficient. Pre-populate fields with your customer information, or your product price list. This simple switch makes your forms faster and reduces the opportunity for human error even further.

Personalize

03. If you're sharing your data with customers or partners, a personal touch can go along way. Add their name in the email, with friendly text. Every client matters, and this touch will show that they matter to you too.

These are just a few small tweaks that can make a big difference in your business. Every organization is different and thus has different needs. But for most businesses, these tweaks will help you save time and money and put your best foot forward.

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How Mobile Apps and APIs Benefit Businesses

As you've seen, mobile apps make data collection easier. Fill out your paperless forms and they go straight to the cloud. This can save you time and money (and a lot of headaches). With APIs (API stands for Application Programming Interface), you can get a lot smarter about how you use this data.

In plain English, an API lets data flow seamlessly between software applications.

For instance, API could let your Salesforce share information with another software.

I know it sounds daunting, but you're already using APIs in ways you probably hadn't imagined. For instance, if you buy movie tickets online, you are using an API. After you enter your credit card information, the website sends it to a remote verification application. If correct, it will send a verification back to the website[11]. Without an API, it would be incredibly difficult to buy anything online.

As a business, APIs combined with mobile apps can make it easy to integrate the data you collect with other business system to further improve your efficiency. Read on to learn four reasons why integrating this data will help your business go even further.

---

[11] Ross, Dave. How Stuff Works. "How to Leverage an API for Conferencing" 2013. http://money. howstuffworks.com/business-communications/how-to-leverage-an-api-for-conferencing1.htm

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1. Automation and Data Integrity

API services eliminate the need for double entry of data. This result is the biggest sell for our customers using APIs. You've already collected information. Why make someone manually transfer that data elsewhere? You can have that information available to use instantaneously within your internal network.

Integrating gives you better quality assurance of your data.

What you collect can be automatically validated, corrected, calculated and made ready for use. More than better data, you also save money. Automation means your workers can focus on their real work. Even if they spent one hour a week on data entry, that can add up to 40 or 50 hours a year focused on improving your business. A little investment in time to automate can pay huge dividends in the long term.

2. Automation and Interoperability

When you allow your systems to work together, you can automate more of your processes. Let's say you use a dispatch service to issue new invoices for agents in the field. Chances are you have to input the same monthly or yearly invoice on a recurring basis. If you have agents in the field you may need to adjust the prices of some of your goods and services on the fly. If you have mobile apps but aren't using APIs, then you'd have to go in manually to change the prices.

*APIs not to be confused with A.P.I.S, or Acute Paper Influx Syndrome. http://stopapis.com/

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No automation means more tedious work and time spent on small changes.

With APIs, you can automate these processes. Do you need images available from a recent inspection? You can get high-resolution images with an API request so you don't have to manually download them each time. Maybe you use a mobile app as a kiosk or canvasing tool to collect data on potential leads. APIs make it easy to build charts and graphs based on the data that you've collected across all your forms in real time. Perhaps you could use this to assess new opportunities!

APIs harness the technology you already have. They unlock the potential to infer relationships and correlations, work more efficiently, reduce errors, and strengthen your business.

3. Custom Solutions Tailored to Fit Your Needs

Another reason to integrate your data with other systems via APIs is that this enables you to customize the way you use and analyze this data, in a way that works best for you. Every organization has different needs and work best with a solution tailored. A custom approach allows you to offer a richer set of services and value added metrics to your customers. So maybe it's time to get creative and identify a custom solution that will help you run your business with greater efficiency?

One company sells TVs door to door. They've been able to create a mobile app with Canvas that integrates with Salesforce. The sales representatives fill out their reports as they go from house to house: who answered the door, who is a qualified lead and so on. All of this information goes directly into their Salesforce database. The next

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day, sales representatives return to the neighborhood. When they open their Canvas app, they can see which houses answered or not, and if there are any qualified leads to follow up with. By using an API between Canvas and Salesforce, the office gets data in real time and sales reps spend less time on data entry and redundant sales.

4. Stay Ahead of The Curve - Embrace the Internet of Things

Companies of all shapes and sizes have embraced APIs. In 2012, Twitter alone was doing 15 billion API calls a day[12]. You can find APIs being used by companies such as FedEx, AccuWeather, Netflix, Expedia. Did you know that more and more revenue is based around APIs?

90% of Expedia's revenue in 2012 came from APIs.[13]

This trend isn't just limited to large enterprise organizations. It's spreading to devices such as Fitbit, Pebble, Nest, and Google Glass. These companies are radically changing the way we interact with our world by offering rich user experiences based on data they collect.

Focus Your Resources on Growth

If you have switched to mobile apps for better data collection and management, you took the bold step of ditching your paper based forms and going paperless. What seemed like a daunting transition then, probably seems like a no-brainer today. Integrating with API web services is a no brainer, too. Instead of worrying about data integrity issues and miscommunications arising from recurring and repetitive data entry, you can rest easy and redouble your resources where they matter. Instead, focus your energy on growing your business, reaching out to customers, and finding new channels to expand your company's reach.

[12] Lawson, Lorraine, ITBusinessEdge, "Just the Stats: APIs". 6/5/12. http://www.itbusinessedge.com/cm/blogs/lawson/just-the-stats-apis/?cs=50563 3/5/14.
[13] Fontana, John. ZDnet, "Billions of API Calls Traversing Web, Redefining 'software'". 5/23/12. http://www.zdnet.com/blog/identity/billions-of-api-calls-traversing-web-redefining-software/493 3/8/14.

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CHAPTER TWO TAKEAWAYS

‣ Look at your customer demographics and data to understand who they are and what they want

‣ Evaluate your business with the same principles Warren Buffet uses for potential investments to decide what data you should collect

‣ Review your data for redundancies in your business and save more money

‣ Automate your data entry and sharing to make your work even easier and streamline your business processes

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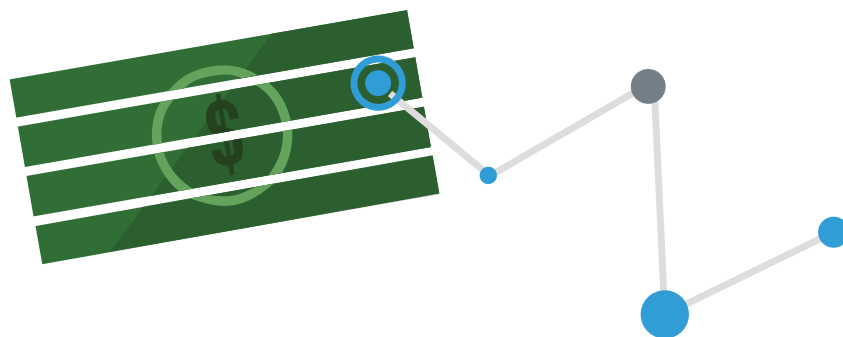
BUSINESS HARDWARE: WHAT YOU NEED TO KNOW

This chapter, we're devoting to explaining what businesses need to know about hardware. But without mobile hardware, smartphones and tablets, mobile data collection is impossible. With a wide range of technology hardware and policy, navigating this field can be tricky.

" *Hardware: The parts of a computer system that* " *can be kicked.*

—*Jeff Pesis*

We explain the different concepts changing business IT, the differences between rugged and consumer devices, as well as creating strong BYOD policy. The information below will give you an understanding of these difference concepts, and the tools to decide what is right for your business.

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Three Concepts Changing the Future of Business IT

The technology landscape of business is changing so quickly that sometimes it's hard to keep up. It seems like every month there's a new technology fad that everyone says you "must have right now". The good thing is you can safely ignore 90% of these as passing fads and just focus on the strategy that will help your company thrive. Part of great strategy is policy that reinforces your work. Great policy will ensure not only frictionless productivity but also security. Potential information leaks are greater than before. As you think about policy moving forward, here are three concepts you should be familiar with when deciding on what to do.

Bring Your Own Device (BYOD)

The widespread adoption of portable technology has led to the possibilities and perils of BYOD. Now that most of your employees have their own laptops and cell phones, many of them want to use their own devices for work. A BYOD strategy means that your company actively encourages the practice of doing work on personal devices. This can mean anything from allowing employees to access email on their personal phones to letting employees use their own laptops at the office.

"The rise of bring your own device (BYOD)

programs is the single most radical shift in the economics of client computing for business since PCs invaded the workplace."

—Gartner[14]

The benefits of BYOD can be wide ranging – your employees get to use devices that they are more comfortable with and you

[14]Virtual Bridges. "BYOD Skyrockets in Popularity in 2013—Here are the Stats to Prove it." 12/20/13, http://vbridges.com/2013/12/20/byod-skyrockets-popularity-2013-stats-prove/ 3/14/13.

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can save money on IT expenses. Many young employees expect that they will be able to use their own devices for work. BYOD is rapidly becoming the go-to for many companies. However, BYOD can open your company up to a number of security and data loss issues. If you think BYOD might be right for you, later in the chapter we have in-depth information to setting up your BYOD policy.

Corporate owned, personally enabled (COPE)

Many companies are starting to realize that a free-for-all BYOD policy doesn't work for them. Some cite security issues. Others are worried that the lack of standardization could cause productivity issues. For whatever reason, many companies are shifting to the corporate owned, personally enabled (COPE) framework.

With COPE, companies issue a corporate device to their employee. However, there is much more control on the employee side over device and application usage. This way the employee still feels like they are in control of their laptops and phones. Meanwhile, you are happy because COPE makes it much easier to standardize your IT offerings and eliminate any holes in your security. The flipside is that it is going to be much more time and cost intensive to implement a COPE policy, so this strategy is probably better for larger companies.

Mobile Device Management (MDM)

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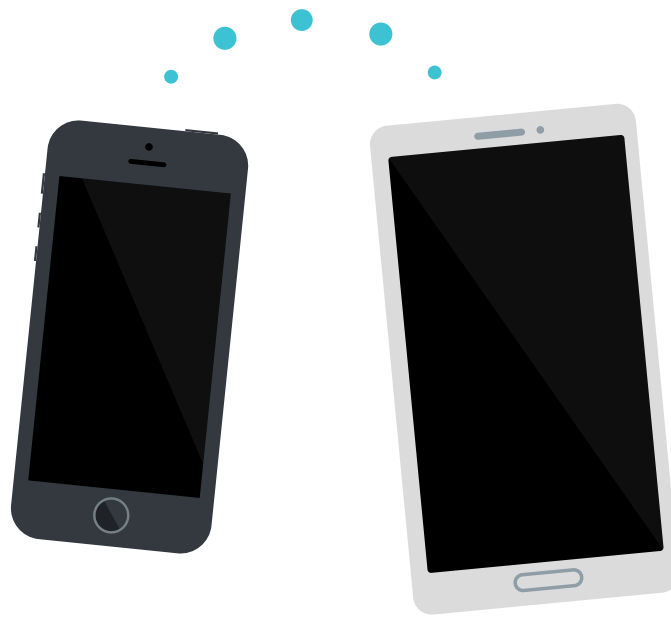
Regardless of whether you choose BYOD or COPE, your employees are going to be using their smartphones for work in some way. This enables an amazing amount of connectivity for your office. However, it also opens you up to any number of security threats, from lost cell phones to compromised wifi networks.

MDM software gives your IT department capability to help manage these risks by giving them control over your employee's phones. MDM gives various capabilities, from remotely reading emails and texts on a phone, to deleting data and locking users out. Obviously there is a line here - too much control, and your employees will feel like their privacy is violated. Yet used properly, MDM is a great tool for making sure that your data doesn't fall into the wrong hands.

These three concepts and how you react to them will have a tremendous impact on your business in the coming years. Don't just ignore this – not only will you be sacrificing potential productivity gains, you could also be opening your business up to potential security threats. Want to know how to be proactive and get up and running with BYOD and MDM? Keep reading.

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Is BYOD Right for You? (Quiz)

Questions:

1. How important is standardized security to you?

   a. Very
   b. Somewhat important
   c. Somewhat not important
   d. Not at all

2. Do you or your employees work in extreme temperature (below 32 F or above 95 F)

   a. Always
   b. Often
   c. Sometimes
   d. Rarely
   e. Never

3. How much are you willing to invest in hardware costs?

   a. Very much
   b. Somewhat
   c. Not much
   d. Not at all

4. How much are you willing to invest in support costs?

   a. Very much
   b. Somewhat
   c. Not much
   d. Not at all

5. How concerned are you about legal liability?

   a. Very much
   b. Somewhat
   c. Not much
   d. Not at all

6. How important is ease of use to you?

   a. Very much
   b. Somewhat
   c. Not much
   d. Not at all

7. Do your workers need long lasting battery performance? (i.e. 5-8 hours of continual use)

   a. Yes
   b. No

8. Can employees legally work after hours?

   a. Yes
   b. No

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Answer Groups:

1. a. 1
  b. 2
  c. 3
  d. 4

2. a. 5
  b. 4
  c. 3
  d. 2
  e. 1

3. a. 4
  b. 3
  c. 2
  d. 1

4. a. 1
  b. 2
  c. 3
  d. 4

5. a. 4
  b. 3
  c. 2
  d. 1

6. a. 1
  b. 2
  c. 3
  d. 4

7. a. 2
  b. 1

8. a. 1
  b. 2

29-22 No, You Can't

Perhaps you're concerned about security, or maybe your employees work in extreme environments. But your answers show you have needs a consumer smartphone can't handle. Your best bet is to look at ruggedized or semi-rugged phones. They carry an initially heavier price tag, but you'll save money down the road.

16-21 You Need to Make Some Decisions

You're on the fence. Some of your needs go beyond what a consumer smartphone can handle. Take a look at your business and decide what you do and don't need. You may find that a consumer device with a protective case can do the trick, or perhaps a semi-rugged device.

8-15 Yes You Can

You may have mobile workers, but nothing that they do would prevent them from using a consumer phone. You'll get lower cost devices and all the functionality your business needs.

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Corporate Technology Policy Considerations Every Business Must Consider

As you start thinking about what policy you will have for your mobile technology, you need to think about your technology needs. There are a couple areas to consider including environment, battery life, durability and functionality needs.

Environment

Take a moment and think about your field workers. Where are they working? What are the conditions like? Some companies have workers in extreme temperature, such as drivers in Alaska, or those working oil rigs in the hot summers of Louisiana.

This can become problematic if you are relying on consumer phones. The iPhone and Samsung Galaxy for instance, work in a range between 32-95 degrees Fahrenheit, and will shut off ouside of that range. They also have humidity and altitude limitations: working between 5-95% of noncondensing humidity and up to only 10,000 feet of altitude.

For consumers, these environmental limitations may not be a huge issue, but they can be for some businesses. Having a phone that cuts in and out of service can be a headache as well as slow down your workers' ability to get projects done.

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Battery Life

As a consumer, it's irritating when your phone battery dies. You can't access your social media or maybe you've lost your favorite playlists for a bit. In business when your phone dies, you lose time and productivity. Especially for field workers, when their phone dies, they could be out of luck for the rest of the day.

While consumper smartphones have come a long way, they are notorious for bad battery life.
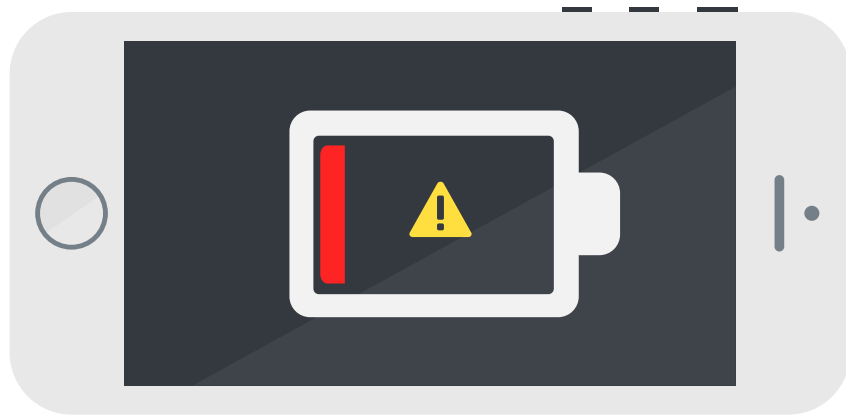
The iPhone 5s has a lifespan of only 5 hours and 2 minutes of continual use[15]. That doesn't even cover one eight hour shift. Some other smartphones are lasting far longer. The LG G Flex, for instance, lasts an amazing 17 hours and 40 minutes[16], rivalling many of the ruggedized options out there.

If battery life is a primary concern for your work, then this must be looked at with a more phone-by-phone basis. As consumer smartphones extend their battery lives, the hard line in the sand between rugged and consumer battery life is beginning to blur.

[15] H, Victor. Phonearena.com. "Apple iPhone 5s battery life test complete: beats Galaxy S4 and Nexus 5, but far from perfect." 12/23/13 http://www.phonearena.com/news/Apple-iPhone-5s-battery-life-test-completed-beats-Galaxy-S4-and-Nexus-5-but-far-from-perfect_id50649 2/12/14.
[16] Bennet, Brian and Lynn La. CNET. "Smartphones with long battery life (roundup)"1/17/14. http://reviews.cnet.com/8301-6452_7-20127942/smartphones-with-long-battery-life-roundup/ 2/12/14.

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Durability

While battery life may vary from phone to phone, durability is a far sharper line in the sand. Consumer phones are notoriously prone to the elements: water, dirt, a hard fall, or deep fried butter [17]. It's amusing when our friends drop their phones in a toilet. But, it's not as funny when it happens to one of your field workers. In fact, if your phones break often, it can raise your total cost dramatically.

Most ruggedized phones will cost more initially, but they are far less prone to shock and wear. Many can be dropped several feet, withstand extremely hot and cold temperatures, be in water for over 30 minutes and resist dust. Some, such as CASIO G'zOne Commando 4G LTE can even be used while you wear gloves.

Today, there are great smartphone protective cases. From the popular OtterBox cases to Ballistic protective cases, these do a great job at protecting consumer phones from dropping or occasional water damage. Take a look at your workers today in the field and their environment. Perhaps a ruggedized phone will save you money in the long run, or maybe you only need a shock absorbing case.

[17]Jones, Kelsey. Gazelle. "Broken Phone Stories: The Weirdest Way to Break a Cell Phone" 6/10/13. http://www.gazelle.com/thehorn/2013/06/10/broken-phone-stories-the-weirdest-ways-to-break-a-cell-phone/ 2/20/14.

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Functionality and Security

While many of the functions once highlighted on ruggedized devices are now available on consumer smartphones, there are still differences between these two classes of hardware. Differences include the ability to scan barcodes, and swipe credit card payments built into their hardware. While these can be added on options for consumer smartphones, you will have to pay an additional cost, as well as be able to maintain any extra devices that go along with them.

There are added levels of enterprise security on ruggedized devices that consumer grade devices won't have. Many ruggedized phones have military grade security. With these devices, your data will be secured with high levels of cryptology. If you work with sensitive data, this level of security can be incredibly helpful, if not essential.

Apple and Samsung are the closest rising stars to these more rugged devices. Samsung for instance, has Knox 2.0 available for S4 and upcoming S5 Galaxy phone. Not only does this separate your data sets, it also creates multilayered security for more comprehensive protection[18]. Apple, meanwhile creates a comprehensive system of protection that includes data encryption, software and hardware security, as well as allowing apps to run securely on iOS.[19]

However, security breaches are still issues for consumer phones, with news stories of various platforms struggling with breaches. While consumer grade smartphones are taking security more seriously, they still have work to do to reach the level of security found in many ruggedized devices.

[18] Samsung. Samsung Knox. http://www.samsung.com/global/business/mobile/platform/mobile-platform/knox, 3/10/14
[19] Apple. iOS Security. 2/14. http://images.apple.com/iphone/business/docs/iOS_Security_Feb14.pdf . 3/10/14

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Conclusion

There are a variety of differences between rugged and consumer smartphones. Not only is there a massive difference in the sticker price, but also where they can work, for how long, and under what conditions. Every business has different environments and needs that it works in. Before you make a purchase, take a moment to go over what you do and don't need. No matter what you choose, careful planning will save you time and money in the long run.

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MOST COMMON BYOD FAILURE POINTS

Missing

Worker Lost Laptop
There goes your data and cash
Better sell your stock

If an unprotected phone or laptop gets lost in a public place, you could be in for big trouble. BYOD could lead you to the loss of some irreplaceable data.

Privacy

It's ok to watch
Employee work devices
Personal is not

Privacy Pitfalls – Many corporate computers are heavily monitored by the company. This is well understood and expected by most workers.These same workers would be shocked by the idea of an employer wanting to monitor their personal laptops.

53

Distraction

Motivation lost
When workers have video
games on work device

Just because your employees are working on personal devices doesn't mean that they should be working on personal projects during the workday. The temptation to indulge in a little me-time is much higher for employees when they are working on their own devices.

Overload

VIRUS DETECTED

VIRUS DETECTED

IT staff too stressed
When dealing with many brands
Standard is better

Your IT staff already has enough to problems keeping your company's standardized devices in working order. Having to troubleshoot a wide variety of phones and laptops could be more than they can handle. At the very least, you might have to hire extra IT workers to pick up the slack.

54

MOST COMMON
BYOD
FAILURE POINTS

Simplicity

Workers too busy
To research cool new tech gear
Could get frustrated

Most employees probably don't actually want to spend time researching the latest gadgets. Being forced to make this decision themselves could lead employees to choose too quickly. If an employee chooses poorly, your company could suffer when their devices aren't optimal for work.

Security

Oooh what is this link?
Computer now hacked
Thieves stolen data

When employees use their computers for work and play, getting a virus can be damaging to your company. Be sure to properly explain how your employees should keep their devices, email, and other apps secure at all times.

BYOD Sonnet

While there are problems with BYOD
From data loss to employee distraction
It can also set your workers free
And significantly increase job satisfaction

Employees can work around the globe
With constant access to the data they need
They'll never stop using their frontal lobe
There's no way that you won't succeed

Not to mention the serious cost saving
From not having to buy workers phones'
Your shareholders will truly be raving
And your competitors scared to their bones

Now that you're convinced of BYOD power
Start working now, in this very hour

How to Create a BYOD Policy and Maintain Your Security

For small businesses, BYOD has many advantages. Your employees love it, and you get mobile technology for a fraction of the cost. Yet, many businesses hesitate about BYOD due to security. Security is the number one issue for business in USA, Germany, Australia and South Korea[20]. Issues stem from an array of device types, as well as being able to access information anytime anywhere.

While most of the security discussion seems to be around big business, this affects organizations of all shapes and sizes. You can create a strategy that gives your employees freedom of use, and protects your company. Here are three strategies and three actions you can do to protect your employees and business.

[20] Virtual Bridges. "BYOD Skyrockets in Popularity in 2013—Here are the Stats to Prove it." 12/20/13, http://vbridges.com/2013/12/20/byod-skyrockets-popularity-2013-stats-prove/ 3/14/13.

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3 Strategies for BYOD Policy

1. Create a Clear Policy

To make any policy work, you need to be clear, precise and upfront with your employees. Explain what is and isn't allowed. This goes beyond email to include apps and social media. It may seem obvious to you, but some employees may not be familiar with security surrounding mobile technology, or they may be new to the workforce. Cover your bases and explain it all in clear black and white terms. This way, you're all on the same page.

2. Educate Your Employees

Beyond explaining your policy, you also need to educate your employees on the procedures they need to do with their devices. This may include explaining how to set up some of the security measures on their phone, email, and computers. You will also need to ensure that they know how to update their software, and to make sure that their security stays current.

3. Separate Work and Pleasure

Keeping these parts of our lives separate is getting harder and harder. When your work phone is also your cell, your data can start getting muddled too. The easiest way is to segregate the work aspects of your phone from your personal use.

How does that work on one device? There are multiple ways to use the same device while maintaining boundaries. Any app used for work, for instance, is only allowed for work purposes. If your employee leaves the company, then you can delete that app. Strong BYOD policies also have separation between work and personal emails.

With a stringent policy of separation, you'll be able to get the data your company needs, without wandering into your employees' personal lives. As regulations get complicated for compliancy, starting separate now will help you stay that way later.

Without proper separation policies, it can be easy for data to be leaked. An employee's personal email with confidential material could be hacked. Or, perhaps screenshots of work are accidentally shared with the public. Whether intentional or not, these can lead to issues for a company down the road. A policy of keeping work and personal separate will protect your company's information.

Three Actions You Can Take

1. Bring In Extra Protection

More businesses may be arming their employees with mobile devices, but a recent survey by Field Technologies showed 36% still using laptops in the field[22]. Great software is available for companies to use in bolstering their data security efforts. For PC computers, PC Mag did a great piece on The Best Antivirus Software of 2013. Not only did they post reviews, but they also tested the products.

If your business also has Mac users, check out another great article from PC Mag, 12 Antivirus Apps for the Mac. These are great resources to figure out the right software for your business.

2. Lock Your Phone (and Erase)

Moving from laptop to phone, many people ask: do they need anti-virus software for their phones? Because of the way smartphones are built, anti-virus software isn't very effective[23].

Instead? Make sure your phone has a locked screen. Add another

---

[22] Krebs, David. Field Mobility 2014 Analyst Outlook, "Field Mobility: The Mobile Workforce Productivity, Customer Service Multiplier"
[23] Bullguard. "Eight ways to keep your smartphone safe" http://www.bullguard.com/bull-guard-security-center/mobile-security/mobile-protection-resources/8-ways-to-keep-your-smartphone-safe.aspx 2/20/14.

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layer of security by making the phone erase after a certain number of attempts to open your phone. In some cases, you can even remotely track and erase devices after they are lost or stolen.

3. Hide Your Bluetooth From Hackers

Most of us see Bluetooth as a great technology to let us talk hands-free (and allow for even more multi-tasking). But did you know it's also a security risk[23]? Hackers have found ways to tap into Bluetooth to make remote calls, access data, browse the Internet, or even listen in on calls. This trick happens in busy places because hacking Bluetooth requires being in range of the device.

If you or your employees use Bluetooth, make sure that you set the device to be non-discoverable. This switch hides your devices from any searches that hackers may use to find you. Also make sure you decline any requests to pair from unknown users. If you don't know who is asking, don't share access to your information.

In the End

Your employees, just like anyone else, are at risk for their devices becoming lost, stolen or hacked. Before, you could lock up your sedentary equipment each night, or put more robust security on your employees' devices. Today you need to work with your employees to create a larger, more robust security system. With great communication, clear policies and achievable strategies, you'll be both mobile and secure.

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CHAPTER THREE TAKEAWAYS

‣ BYOD, COPE and MDM are important policies affecting businesses and their mobile hardware

‣ Look at your company's specific needs to determine the right policy for your company

‣ Determine your need before deciding what to purchase

‣ Creating a strong and clear BYOD policy can help prevent security issues.

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PRODUCTIVITY IN THE DIGITAL AGE

The past three chapters on data, software and hardware all tie back to one important concept: how to be a productive and effective organization. In 2014, competition is becoming fierce as businesses try to do more and more with less. While business information use and collection can provide opportunities to be a more productive company, there are other ways.

This chapter takes a look at some of the other various ways to be productive. From telecommuting to looking at how we waste time, this chapter is full of information to help you make the most of your work day.

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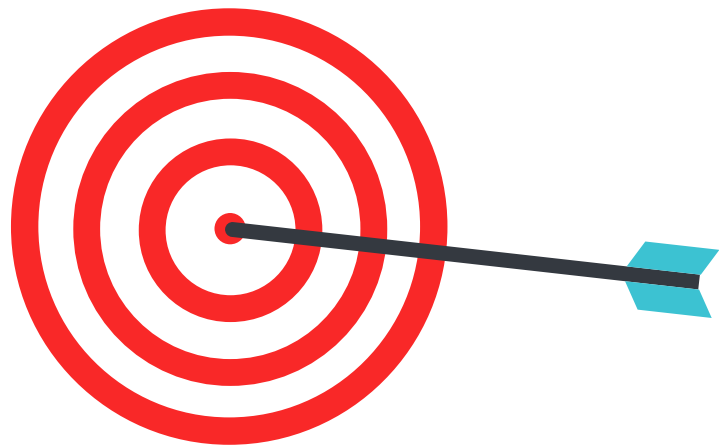
5 Benefits of Technology-Assisted Collaboration by Alexandra Solymar

The benefit of collaboration is not a novel discovery. However, sharing information and communication efficiently with technology is a more recent and rising phenomenon. These five points below are interconnected and their combination makes collaboration an invaluable process in the modern workplace.

1. Increased Productivity

Collaboration enhances productivity. It encourages new ideas and decision-making in groups, or as one person at Cisco says, "being able to leverage the experience of many people gives you diversity, and different views. It sums up to more than if you do it on your own."

However, technology can strengthen this process by helping people connect over long distances or overcome the problem of forgotten discussions and hallway conversations. Email and Skype can facilitate communication over long distances, while note taking software helps conversations be recalled for later. Work gets done faster if co-workers can use apps to share and record information, without even having to be in the same physical space.

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2. Easier and Better Communication among Team Members

Collaboration solutions enable co-workers to share their ideas and information in more unrestricted ways. Previously, the more vocal team members were likely to possess the most power in shaping a project. This possibly left other members, even experts in their areas, undervalued or missed entirely.

Technology can create a level playing field: Everyone has the same chances to speak up. The ability to communicate via discussion boards, for instance, allows all team members to contribute equally.

Additionally, meetings over the internet eliminate the burden of distance between collaborators. Whether team members are in Hong Kong or LA, everyone can come to the internet with their ideas and expertise.

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3. Multitude of Strength

When the opportunities of speaking up are more balanced in a team, the likelihood of the strengths and talents of each member surfacing increases significantly. Having an eloquent content writer or a savvy developer or a successful salesperson on your team benefits your company. When all of them work together, projects profit from the totality of all members' expertise. Teams can benefit from all the skills that co-workers bring to the table, and create better quality work.

Studies reflect this: Companies that collaborate respond to the market faster, and solve problems more efficiently and creatively. Ultimately, this makes companies more competitive.

4. Facilitating Change

One advantage of the previous three points is that collaborative teams become stronger through innovation. Free interaction and the merging of different perspectives create positive changes which make teams and companies overcome challenges and move forward.

My East Coast company recently hired a new VP from California. The differences between the East Coast and West Coast ways of doing business quickly became evident. Thinking the East Coast tradition too "buttoned-up," our West Coast VP is advocating more relaxed solutions for our company. This is a wonderful opportunity for opposite viewpoints to come together and find an ingenious middle-ground. My company can develop faster with the input of colleagues who see and do business differently.

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5. Tailored to the Modern Global Workforce

Technology today diminishes the relevance of geographical location to the place of employment. Companies are less limited to hire strictly within a specific region. Employees benefit as well with more flexibility to work from home or while traveling.

Furthermore, collaboration, especially when it is made easier with technology, breaks down the outdated, traditional structure of working. Whereas the traditional process is more rigid, collaborative ways are more flexible. It allows co-workers to act as partners, not as competitors, striving to achieve the same goal. These make up the very core of the modern global workforce.
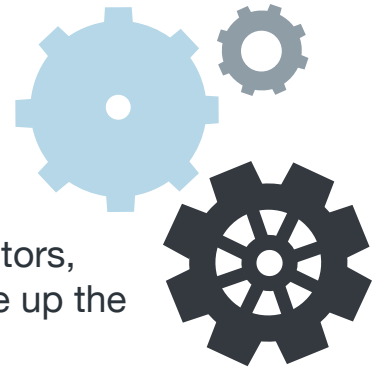
Collaboration is an opportunity for growth and an important element of successful and productive work. Technology is not a fundamental component of collaboration; however, it can make collaboration a better and easier practice for team members.

About the Author

Alexandra is an Application Consultant at Intellinote, taking on a wide variety of tasks ranging from communicating with users to HTML coding. In her free time, she likes to cook and convince people that the cuisine of her homeland is delicious.

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How One Man Saved 21 Days a Year

Martin Denny, of Safety-Link Consulting, is a health and safety expert based in Ireland. Martin had many forms related to safety, health, as well as environment inspections, audits, reports, and more. Before going mobile, he was up to his neck in paperwork. It was a hassle requiring duplicated efforts to both fill out a form and then input the data into a computer. Being on the road so often, the last thing he wanted to do at home was spend hours in front of his computer.

By 2011, he was tired of all the work he did with paper forms. Martin didn't wait around for a solution to find him.

"You will get nothing in this life sitting on your backside waiting for it to come to you." He said, "You just have to get out there and get it for [your]self."

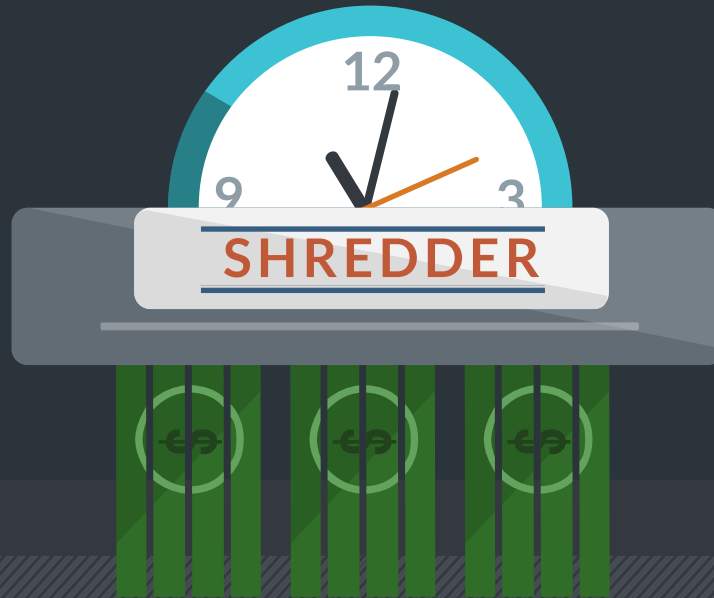In his quest to discover a solution that would save him time, Martin found Canvas and saw the value in going mobile. Not only would a paperless solution cut down on costs, but it would also eliminate the data re-entry step that was taking up much of his time. Canvas was able to provide what he needed, with features like signature and GPS capture. It was the best solution for him.

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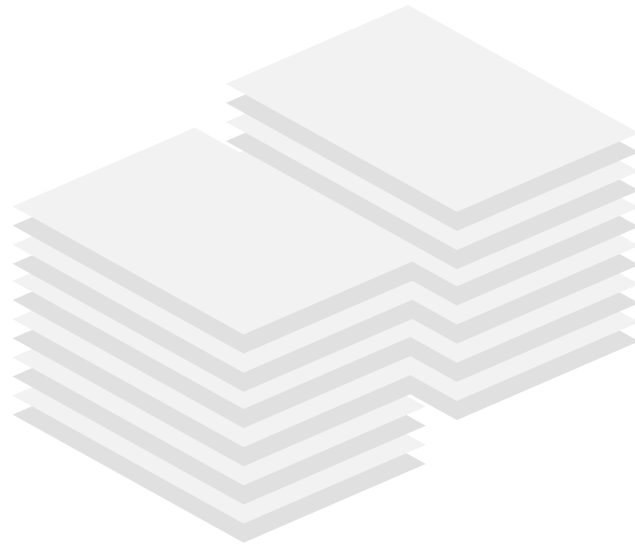
Martin strongly believes in the value of time. "Your time" Martin says, "is something you can never get back or give again." For him, the most attractive reason to go mobile is the time savings it offers. With greater convenience, he no longer wastes hours on tasks that used to kill his productivity. "I can do more 'office work' on the road, giving me more free time," explains Martin, "That's 21 less days a year I will have to work and enabling me to spend more time with my family." 21 more days of vacation, and quality time? He can't put a price on that!

While Martin started off as just another Canvas user, he has grown his relationship with Canvas to become a partner as well. Canvas converted these forms to mobile apps and set Martin up with a Safety-Link co-branded application store to share the mobile app versions of these forms online.

Safety-Link has now completely migrated away from paperwork; in fact, when a customer insisted on receiving paper forms last Christmas, they had to go out to buy paper and ink since Safety-Link didn't have any in stock!

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SHREDDER

HOW DO YOU WASTE TIME?

PLEASURE

WORK

Are you on social media websites?
- Yes
- No

Find your hours passed reading blogs?
- Yes
- No

Pursuing the latest on sale shoes?
- No
- Yes

Taking personal calls?
- No
- Yes

Set your phone to silent.

Chatting online with friends?
- No
- Yes

Falling asleep?
- No
- Yes

Grab some coffee or tea.

Don't like caffeine?
- Yes

Are you exhausted staring at a blank wall in fatigue?
- No
- Yes

Stretch, take a 15 minute walk.

Lurking at the water cooler?
- Yes

Get an Anti-Social App
Will keep you online but off the tempted sites.

Do you spend an hour or more lost to email?
- Yes
- No

Stuck in hours of meetings?
- Yes
- No

Set firm time limits.

Are you stuck spending hours on data entry or filing?
- Yes
- No

Canvas eliminates manual data entry and makes finding files easy. Light dispatch to easily send information to mobile workers.

Are they urgent?
- No
- Yes

File in a folder to do later.

Are they an actual emergency?
- Yes

You're wasting time, go answer them!

Struggling to communicate with field workers?
- Yes
- No

Searching for personal docs?
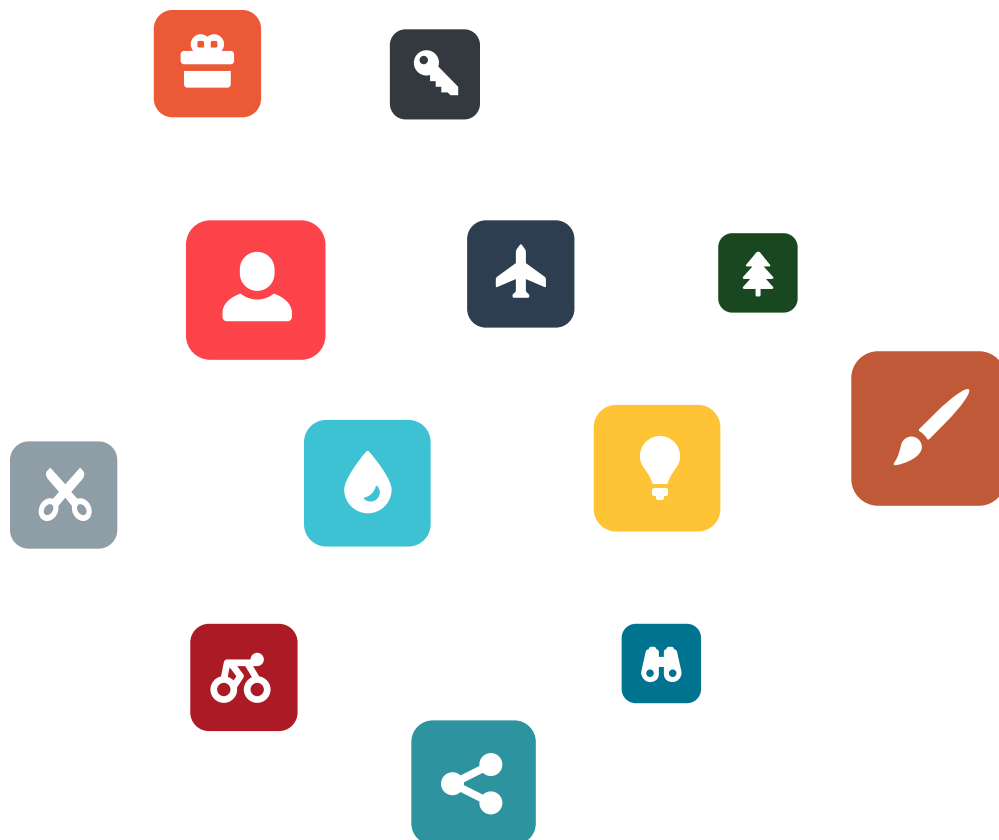- No
- Yes

Try Evernote

Answering Quizzes?
- Yes

GET BACK TO WORK

www.gocanvas.com

Apps You Need and Apps You Need to Avoid

Mobile apps are booming. In fact, the rate of new apps coming on to the market is actually increasing. Many mobile apps can help you in your day to day life in business. But which ones should you look out for? Which ones are best to avoid? We have a round up to help you navigate.

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Meeting Scheduling: Doodle

With multiple busy schedules, trying to decide on meeting times can be a pain. Doodle simplifies the process immensely. Everyone fills in the times that they are available to meet, and Doodle automatically schedules a time for you. No need to struggle with finding a time when everyone is free.

Collaborative Information sharing: Intellinote

Do you often find yourself searching through your email inbox, looking for an attachment from three months ago? Do new employees at your company feel left out because they are missing important documents and information. Intellinote is an intelligent cloud workspace which allows your employees to capture your data and easily collaborate on it. It is a fantastic project management tool that any company would benefit from using.

Social Media Scheduling: buffer

Nowadays, maintaining a strong social media presence is a key part of any business's marketing strategy. Yet finding the time to post four to five items a day can break up your workflow and distract you. Buffer will automatically push out our tweets and Facebook posts, meaning you can block out your week's social media content in one single session. It even knows the correct time to put content out to reach peak engagement.

Reminders: DUE

Scheduling reminders for yourself helps make sure that no tasks slip by undone because you just forgot about them. Due provides a simple and seamless experience for setting yourself reminders. You can either choose a specific time, such as 4:30 on Friday, or just tell due to remind you to do something in an hour.

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Email: BOOMERANG

When sending important emails, you want to know for sure that you get a response. This Gmail plugin will "Boomerang" emails back into your inbox if they have not been responded to in a certain amount of time. This allows you to easily remember to follow up with your recipient. As a nice side bonus, Boomerang also allows you to schedule your emails.

Awareness Tracking: mention

Just as important as publishing good social media content is responding when you are mentioned online. Mention will track your company across the web and social media. With Mention, you will be able to easily find and respond to people discussing your company anywhere on the internet.

Time Management: Rescue Time

How do you really spend all of your time? Is email eating up your day? Maybe those quick social media "breaks" aren't so quick after all. RescueTime calculates how you're spending your time and breaks it down at the end of each week. Before changing your habits, this is a great way to see what you really do versus what you think you do.

Calendar: Sunrise

This is a great all-purpose calendar app. It has a beautiful, simple design that is highly functional yet avoids getting cluttered. It is a great alternative to the default smartphone apps.

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AVOID

Gratuitous time wasters

You know the types of games we're talking about. The ones that require you to "check in" every certain number of hours to progress. While we don't want to name specific names, these apps have been known to … crush your productivity.

Default calendar and reminder apps

There is nothing wrong with the default iOS and Android calendar and reminder apps. However, they are very generalized, meant to serve the needs of the general population. As a businessperson, there are any number of great apps that are tailored to suit your specific needs. You rely on these apps for quite a bit. Doesn't it make sense to choose the solution that best fits your needs?

Mobile apps are a part of our lives now, for better or for worse. With new apps coming on the market everyday, it can be impossible to keep up. Instead, focus on what you need, and what actually helps you through the day, not the other way around.

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6 Ways to Stay Productive While Working Remotely

Whether you are going to be telecommuting every day, or just one day a week, it's not the same as working in an office. You may not have the long commute to and from work, but there are other dangers when working from home. Here are six ways to make the most of your telecommute.

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1. Get up and Get Dressed
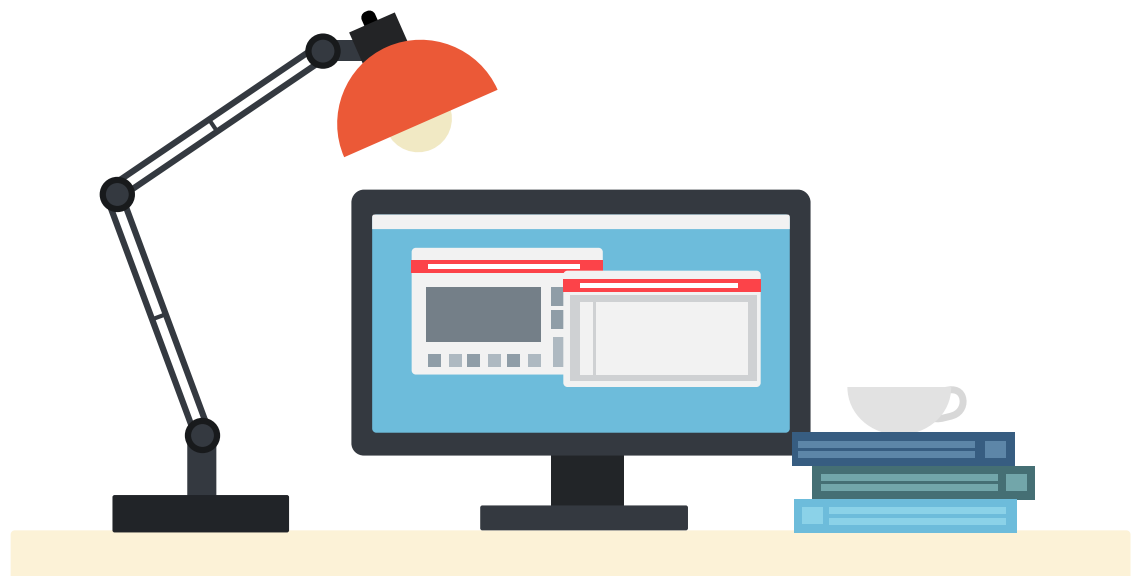
"Don't stay in bed, unless you can make money in bed."
—George Burns

It's tempting when working from home to stay in your pajamas and never leave your bed. However, if you are going to be telecommuting only sometimes, it's important to maintain your routine. That means getting up around the same time you usually do, and getting out of bed and dressed for the day. Whether your office attire is suit and tie or jeans and a tshirt, prepping as though you are going to work will help you get in the mental state of working.

Even if you are going to be telecommuting everyday from home, it will help you stay focused, and feel better. When you wear sweat pants and don't shower, it can reinforce your feelings of sluggishness and fatigue. Plus, the last thing you want is to be caught in an impromptu video call while wearing your PJs.

2. Sit at a Desk or a Table

I know, your bed may be incredibly snug and warm. But working at least at a table will ensure you have better posture while working. Posture isn't just about good manners, but also will help you be more productive. Slouching may seem easy, but actually causes lots of strain on your back and neck. This can lead to fatigue and tension headaches.

Bad posture can also affect your mood. A 2012 study showed that 99% people who slouched while walking down a hallway had decreased energy levels[24]. On the other hand, those they asked to skip down a hallway had increased energy levels.

Correcting years of bad posture can be difficult to overcome. By sitting at a desk and upright chair, you can help ensure better posture. To ensure you don't slip back into bad habits, try to remind yourself every hour to sit up straight.

[24] BioFeedback. Vol 40, Issue 3. Peper, Erik. "Increase or Decrease Depression: How Body Postures Influence Your Energy Levels". p 125-130.

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3. Take (Limited) Breaks

It can be easy to get caught up in a project that you don't leave your desk for long stretches. To stay fresh and alert, taking 10 minutes every hour can actually help you do more. Studies show that breaks keep you more alert and more creative[25].

It's easy to feel guilty, especially if you are working from home. There are deadlines to meet, and a break doesn't seem to get any work done. If you're on a roll, there's no need to stop, but if you find yourself dragging, take a short break. Go for a walk. Listen to a few songs with your eyes closed, or just do a few simple stretches. You may find you have more energy and even a solution to a problem that's been bugging you.

4. Stay Connected

If you are working on a team or for a larger company, it's important to stay connected to your company when you're working remotely. This helps ensure strong collaboration, as well as staying in the loop with what's happening to your team. While it's tempting to avoid your phone and email, this desire will actually make your work harder in the long run.

More than keeping open traditional communication lines of phone and email, also look at free instant message services. Skype, Gmail, and Facebook all have great instant messengers to help you communicate quickly.

Missing meetings? There are a lot of great technologies allowing you to dial in and participate. Join.me is a great free service to schedule calls, and share screens to see what is being discussed. In a global marketplace, your company may already have an app they use with international business partners or clients. Don't miss important meetings simply because you have to work from home.

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[25] Korki, Phyllis. New York Times, "To Stay on Schedule, Take a Break". 6/16/12. http://www.nytimes.com/2012/06/17/jobs/take-breaks-regularly-to-stay-on-schedule-workstation.html?_r=2& 3/1/14

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5. Protect Your Tech and Ensure Support

If you work from home you do most of your work probably on your computer and the Internet. While it's become easier to work anywhere, it also reveals our reliance on our tech. Make sure you don't have to spend days knocked out due to a computer virus or Internet issue. Keep your antivirus updated and any hardware tools you use. This will keep you protected from computer malfunctions in the future.

If you have tech support, reach out to them. Let them know that you will be working remotely either part or full time. See what they recommend and what they can do for you when you aren't in the office anymore. Understanding your options before any issues will help you if a problem arises.

6. Set Limits

Creating boundaries when working at home can be difficult. It's easy to work through your lunch break, and let work spill on into later hours. However, for long term productivity and peace of mind, it's important to set boundaries. Once more, set yourself limits as you would in the office. If you wouldn't work from 7 am to 9 pm at the office, don't do it at home.

Rest is important for your long-term productivity. Decades of research show that the 40-hour work week is ideal for productivity. Working longer can affect your health, family, and productivity[26]. Why? It can lead you to skimping on the self care that can help tamper any stress from work, such as working out, a support network, even sleep.

When working at home create separation. Set yourself an alarm every night to stop working if you need to. If you have an office, get up and close the door behind you. No matter what is going on in your work, you will be better able to deal with it after some time off and a good night's sleep.

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[26] Goudreau, Jenna, Business Insider. "Why Working 6 Days a Week is a Terrible Idea" 4/18/13. http://www.businessinsider.com/why-working-6-days-a-week-is-bad-for-you-2013-11 3/1/14.

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CHAPTER FOUR TAKEAWAYS

- Technology can help companies collaborate like never before, spurring both innovation and productivity

- Removing redundant data entry can save you entire days out of your year

- Understand how you waste time and what you can do to stop it

- Choose mobile apps that help you get more done, not waste your time

- Set rituals, limits and a designated space to help you make the most of your telecommute

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CONCLUSION

You've learned about collecting and using business information. Now do it!

Collecting and using business information has never been more important than it is now. If you're a small business, smarter use of business information can be the difference between struggling to stay in business and being able to expand your team and grow your profits. If you're an enterprise business, efficiencies and insights gained from better use of business information can help you gain market share and deliver more value to key partners, customes and stakeholders. The companies that learn from data are leading the pack.

No matter what industry you are in, you collect and use data already.

In this book, you've learned some great takeaways about collecting and using data as well as creating policies around the changing hardware. The landscape may be changing but you can grow with it. Mobile apps provide a simple switch to help you stay organized and up to date.

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CONCLUSION

Technology will always be changing. Innovation continues to drive the world forward. Touch screens are no longer new but a must for phones. Finger swipes are being incorporated on both Android and iPhone devices. Wearable tech is starting to enter the market with Google Glass and Pebble Watch.

What doesn't change is your ability to make decisions. Great businesses aren't only determined by the technology they have, but the vision, the decisions they make. Technology can't make those decisions for you. Mobile apps help make the lay of the land clearer so you can make the best decisions for your business.

If you don't have 20/20 vision, you wear contacts or glasses to see better. Today, smarter data management is necessary to give you that vision for your business. You will always try to make the best decisions. Mobile apps and smart technology choices can help.

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Thanks for reading!

- Canvas Marketing Team