Ideas for effective IT improvements for

Design Central

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About this document

This document seeks to describe the ideas generated the brainstorming session held on 23 Feb 2012 at the Design Central offices.
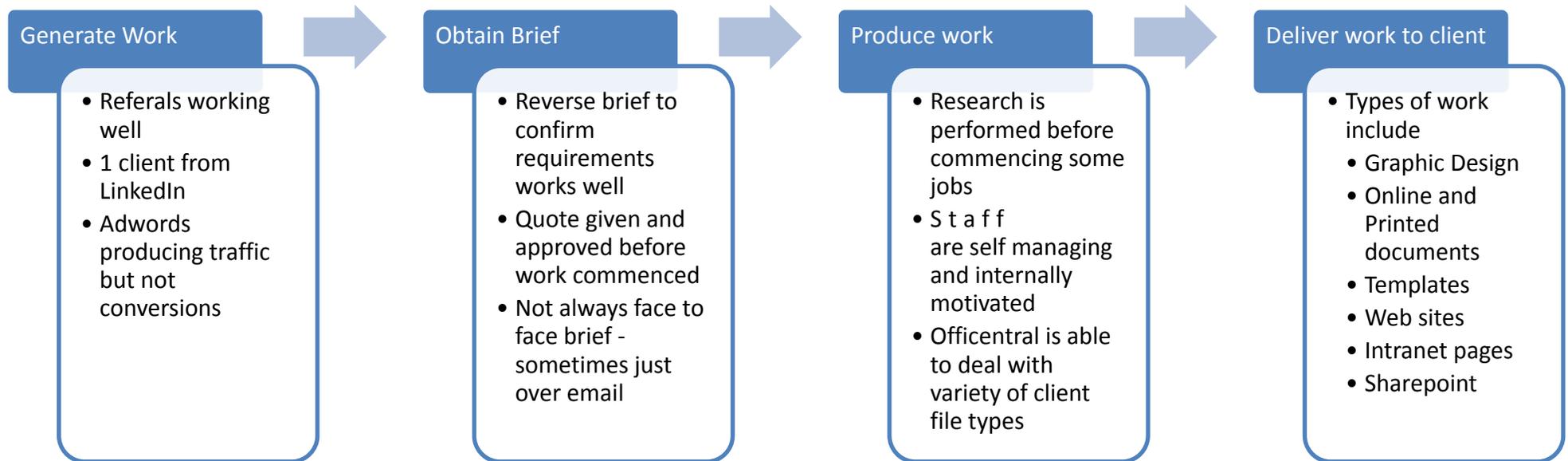
Company Information

General information about Design Central is recorded below.

Name	Design Central
Size	2 people
Description	A two person company run by James and Cathy (life partners). Both of them provide graphic design services to clients, often working separately, but delegating tasks on large projects or according to each person's speciality. Additionally, James focusses on lead generation tasks, such as maintaining the website and blog, and sales. Cathy focusses on the financial side – including invoicing and tax preparation.
Aims for business	• To increase project based work • To provide broad design advice and consultancy
Design Central	• Is Windows based • Uses their ISP with Gmail and Outlook for email • Has a File Server • Is highly IT literate, including being able to install and maintain file servers and write code • Has a file back-up regime • Prefers locally hosted applications to cloud based applications • Has an xampp web server • Has a minimum hourly rate $72
Brainstorming Attendees	• James Madel • Cathy Madel

Production Process

The following diagram represents the key steps in the delivery of the core Design Central service. Ideas discussed at each of the stages are included.
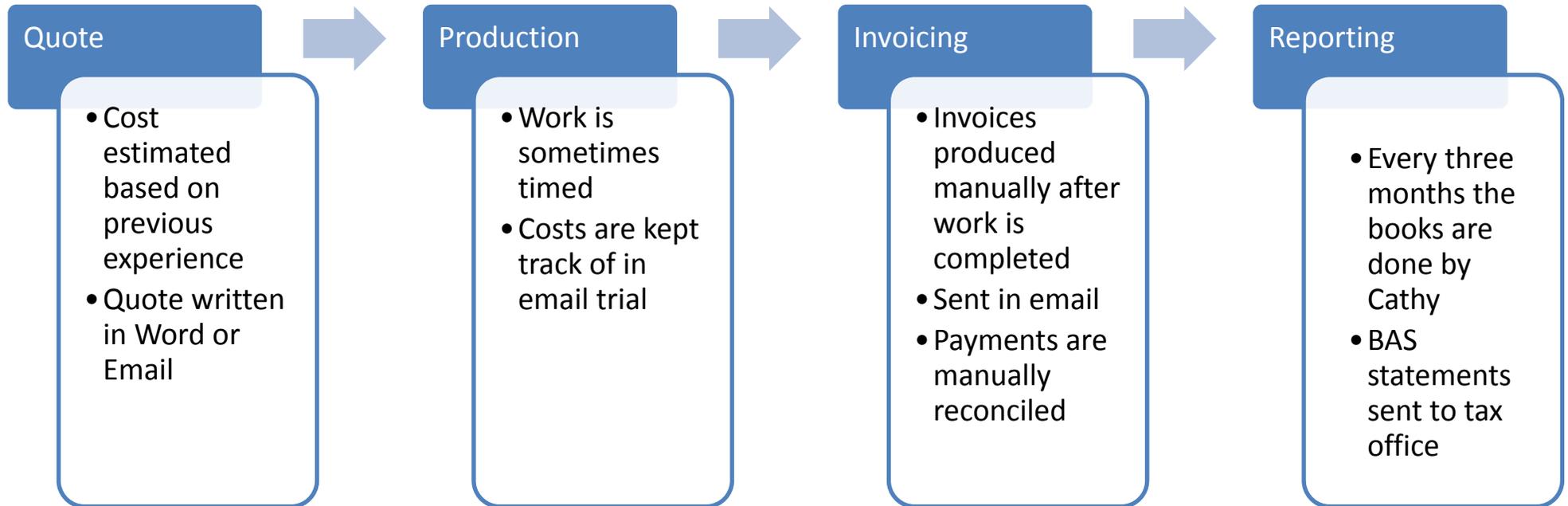
Generate Work

- Referals working well
- 1 client from LinkedIn
- Adwords producing traffic but not conversions

Obtain Brief

- Reverse brief to confirm requirements works well
- Quote given and approved before work commenced
- Not always face to face brief - sometimes just over email

Produce work

- Research is performed before commencing some jobs
- S t a f f are self managing and internally motivated
- Officentral is able to deal with variety of client file types

Deliver work to client

- Types of work include
- Graphic Design
- Online and Printed documents
- Templates
- Web sites
- Intranet pages
- Sharepoint

The production process is maintained through

- Face to face production meetings
- On-going collaboration between James and Cathy

Financial Process

The following diagram represents the key steps in the quote to payment process. Ideas discussed at each of the stages are included.

Quote	Production	Invoicing	Reporting
• Cost estimated based on previous experience • Quote written in Word or Email	• Work is sometimes timed • Costs are kept track of in email trial	• Invoices produced manually after work is completed • Sent in email • Payments are manually reconciled	• Every three months the books are done by Cathy • BAS statements sent to tax office

The financial process:

- Is mostly manual – carried out in Excel Worksheets
- Takes Cathy 4 hours a month

Quickbooks has been considered as a way of automating the process, but the expense is considered excessive.
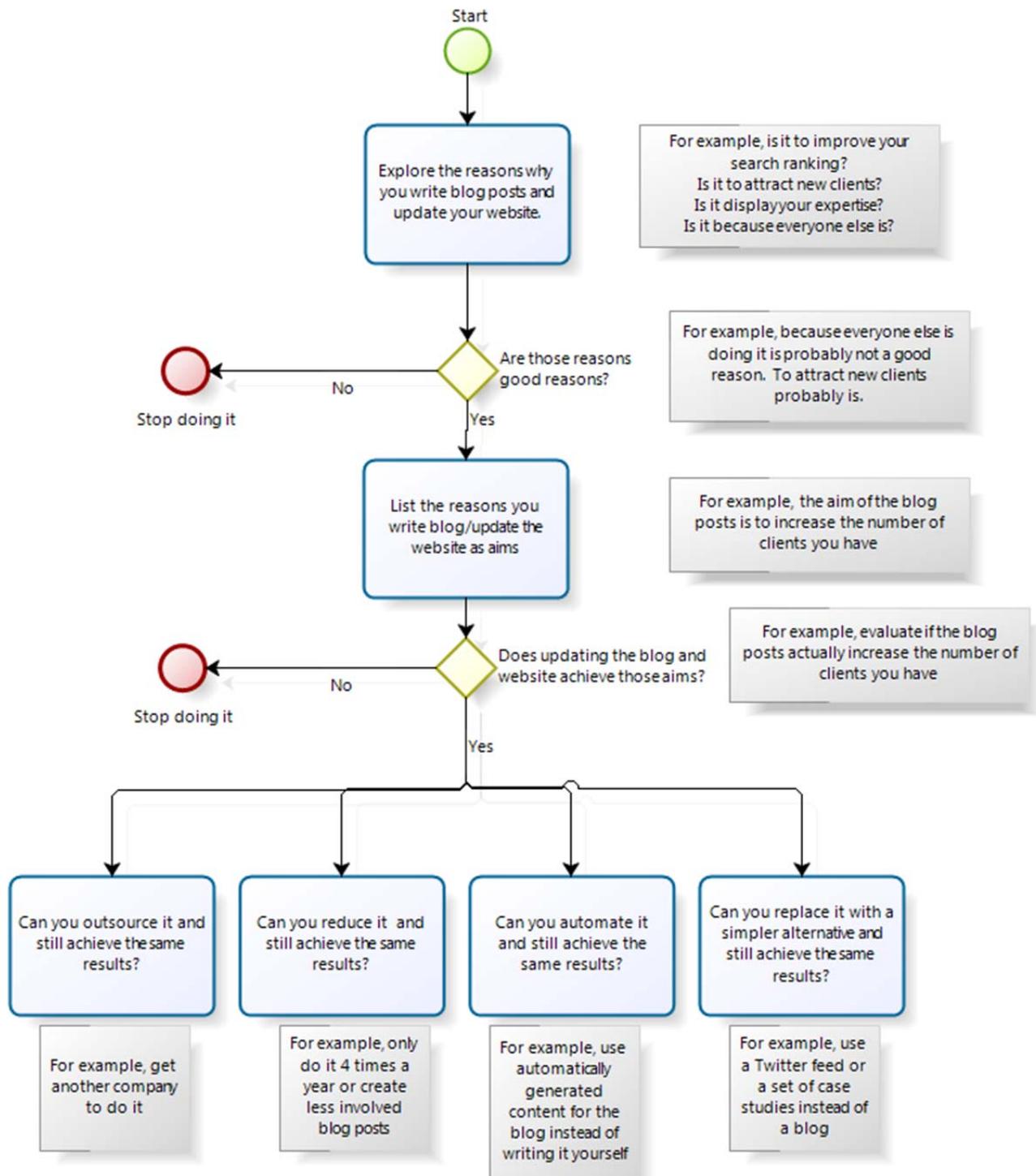
Potential Improvements

Three potential areas where improvements could be made are:

- Writing the blog/updating the website
- Storing and sharing knowledge
- Recording and analysing customer information

These are discussed below.

Writing the blog/updating the website

Writing content for the blog and updating the website were identified as a pain point for Design Central. The following process improvement flow chart can be used to create alternative approaches and options you may like to consider:

Start

Explore the reasons why you write blog posts and update your website.

For example, is it to improve your search ranking?
Is it to attract new clients?
Is it display your expertise?
Is it because everyone else is?

Are those reasons good reasons?

No — Stop doing it

Yes

For example, because everyone else is doing it is probably not a good reason. To attract new clients probably is.

List the reasons you write blog/update the website as aims

For example, the aim of the blog posts is to increase the number of clients you have

Does updating the blog and website achieve those aims?

No — Stop doing it

Yes

For example, evaluate if the blog posts actually increase the number of clients you have

Can you outsource it and still achieve the same results?

Can you reduce it and still achieve the same results?

Can you automate it and still achieve the same results?

Can you replace it with a simpler alternative and still achieve the same results?

For example, get another company to do it

For example, only do it 4 times a year or create less involved blog posts

For example, use automatically generated content for the blog instead of writing it yourself

For example, use a Twitter feed or a set of case studies instead of a blog

Storing and sharing knowledge

It was identified that Design Central did not have a system for retaining and sharing knowledge. As the delivery of Design Central's core service is strongly linked to the knowledge and skills of James and Cathy, improvements in managing and sharing their knowledge will have a positive effect on both workflow and profitability.

What is Knowledge Management

Knowledge management is the practice of organizing, storing, and sharing vital information, so that everyone in the organisation can benefit from its use.

Benefits of knowledge management include:

- New knowledge can be quickly captured at the time it is found, and retrieved and used at a later time by either James or Cathy – independent of who first found it
- Valuable knowledge is never lost. This means that you don't lose time and money when you or Cathy have to relearn how to do something.
- Because ideas can be shared easily, knowledge management can increase innovation.

Knowledge you may like to capture includes:

- Useful web pages with techniques or ideas that might come in handy
- A list of suppliers – such as Printers and Developers – and additional comments about their service
- Processes for commonly created types of work
- A list of shared passwords
- Step-by-step instructions for carrying out infrequent and hard to remember tasks

A tool which you may like to use as a knowledge repository is Evernote.

Evernote (http://evernote.com/) is an online note-based system that:

- Captures notes, documents, web pages, images and sound files
- Allows the content to be accessed across your computers, phones and tablets
- Has search functionality to quickly find relevant knowledge within the content

Evernote is free for individual users. Alternatives to Evernote include:

- Creating a folder called Resources on your file server. You can then save interesting web pages into it and/or use Word documents to record information
- Installing a Wiki (such as Media Wiki - http://www.mediawiki.org/wiki/MediaWiki) on your web server and using it to store your knowledge

Recording and analysing customer information

It was identified that Design Central did not have a system for recording and analysing customer interactions. As such a Customer Relationship Management system could open up new opportunities for Design Central.

What are Customer Relationship Management Systems (CRMs)
CRMs allow you to capture and share the following information with everyone in your organisation:

- Contact details for all the companies you interact with and the people who work within them
- A communication history – including records of the e-mail messages, business notes, appointments, and phone logs – of every contact you and every other staff member has had with a person
- Everyone who has been contacted through your marketing and what the result was.

Using a CRM to record information about your clients provides you with insight into who they are and what they may want. This insight can be used to:

- Identify trends and patterns in customers and their needs
- Improve sales through the better anticipation of customer requirements
- Better identify which customers will prove to be profitable
- Create targeted marketing campaigns
- Create more effective client interactions, by allowing both of you to access a history of all interactions with a customer and their preferences before contacting them

Suger CRM
A locally installed copy Suger CRM was identified as a potential system. The following are some general recommendations.

- Work out what you want to use the CRM for. For example, is it to allow you to send marketing targeted to specific types of clients? Or just to record client details?
- Work backwards from your goals for your CRM usage to decide what information you want to capture. For example, if you plan to send different marketing material based on a person's role, make sure you capture role information in the CRM
- Check to see how well the CRM integrates and shares information with other programs – such as your email client and finance system. If add-ons are required to do this, check that they are available and how much they cost
- Check that both James and Cathy find the CRM easy to use and are comfortable using it. If not, the system will quickly become a pain to use
- Check that you can easily extract information from the system. Note that this can also be done through directly interrogating the database as well as through the front end
- Check to see that there is useful help available – such as a strong community supporting the CRM and good help files/web pages – and if there are any costs involved

What next?

In terms of the next steps, you may like to consider the following.

- Use the flowchart to determine if there is a better alternative to writing blog content and updating the website

- Set up a knowledge repository, such as Evernote or a Wiki

- Set up and trial Suger for a number of weeks to assess its suitability and usefulness

How Web Generation can help

If desired, I can provide the following assistance.

Blog writing and website updating

- We can brainstorm possible alternatives to work out how you achieve your blog writing and website updating aims but with less pain $220

Knowledge Management System

- We can work out what knowledge management system will suit you best, and how to set it up so that it does what you need it to do $330

- I can set up the knowledge management system for you – including providing training and documentation   Price determined after requirements have been gathered

Sugar CRM

- We can work out what the CRM needs to do in order for it to be as effective as possible. $330

Other

- We can run the brainstorming session again – focussing on a different area – such as your *quote to job to timesheet to invoice to tax* process $330

Thank-you

Thank you for the opportunity to work with you. If you have any questions please contact me on 0405 020 758 or info@webgeneration.com.au