

Super-Charge Your Agenda!

Using Your Agenda as a Personal Agenda Manager
by Itamar Engelsman

1. Introduction.

There are several special programs available that will allow you to follow up your business contacts. Some of these have to be purchased, others are free of charge, but all are separate programs that integrate to a larger or smaller extend with your standard Agenda file on your Psion. Several years ago already I wanted to use my Agenda file itself as my business contacts follow up program and tried to find a way to do this. It was really rather simple and works for me up to this day on my mBook (it went from a S3a/c to a S5 to the 5MX, the S7).

I am a metal trader and sell non-ferrous metal products to a small customer base. I also sell electrical switches, sockets and cable ducts produced in Israel to the European market and we currently contact a good number of new potential clients to try and interest them in our articles.



2. The Principle.

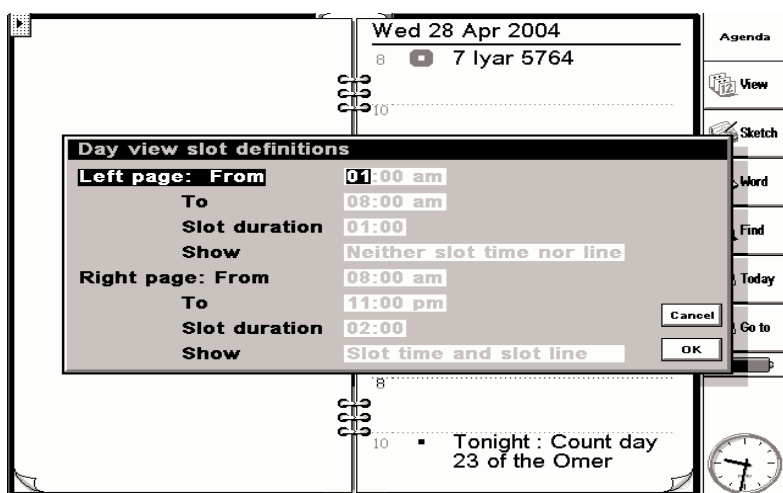
My system is based on the fact that when you enter a dated entry on a To-Do list it will only show up in the Agenda on the specific date you entered. However, once that date has passed it will continue to show up until you either give it a new date, cross it out (having set the To-Do list not to show crossed-out entries) or delete it.

It is further based on the possibility to attach a Word file to each entry with any text you want.

It helps to organise your Agenda file in the following way. Leave the left side without times for the To-Do lists and use the right hand side for time entries like meetings etc. Use the Tools settings to create this. [Note. You must be in Day View, and then select Tool - View preferences to achieve this. Ed].

Based on these principles I created a To-Do list for each type of product or group of products with the names of the Companies I want to be in contact with. Each Company I give a date I need to contact them. In the attached Word file I note down at the top the name of the person to be contacted, telephone numbers, fax number and email address(es) with a horizontal line below these details.

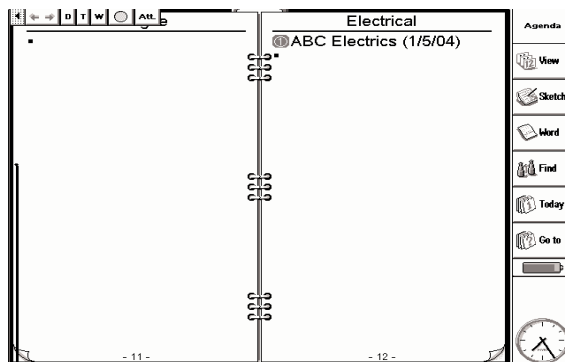
Below the line I note down details of the date I contacted them and a short summary of what was discussed. Of course when the date arrives to contact a client I don't always succeed to contact them. The entry however will continue to show up on the "Today" view until I either change the date, cross it out or delete it. This gives me a daily reminder to contact this (potential) client.



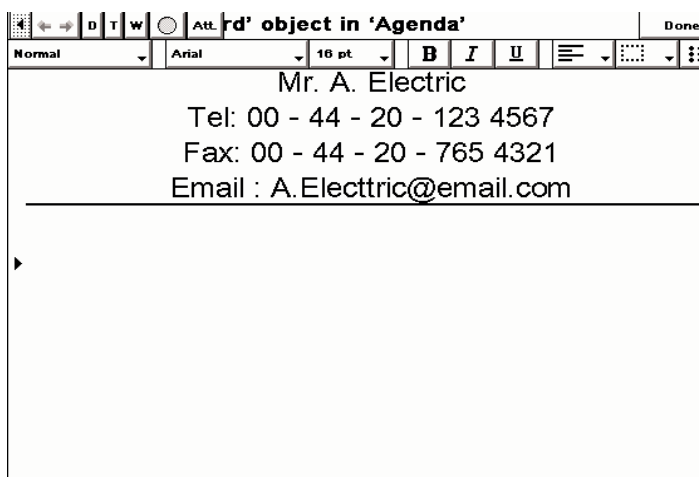
This system allows for a full follow-up of (potential) client contact until you either don't need the contact anymore or did not succeed and can delete same.

3. In Practice.

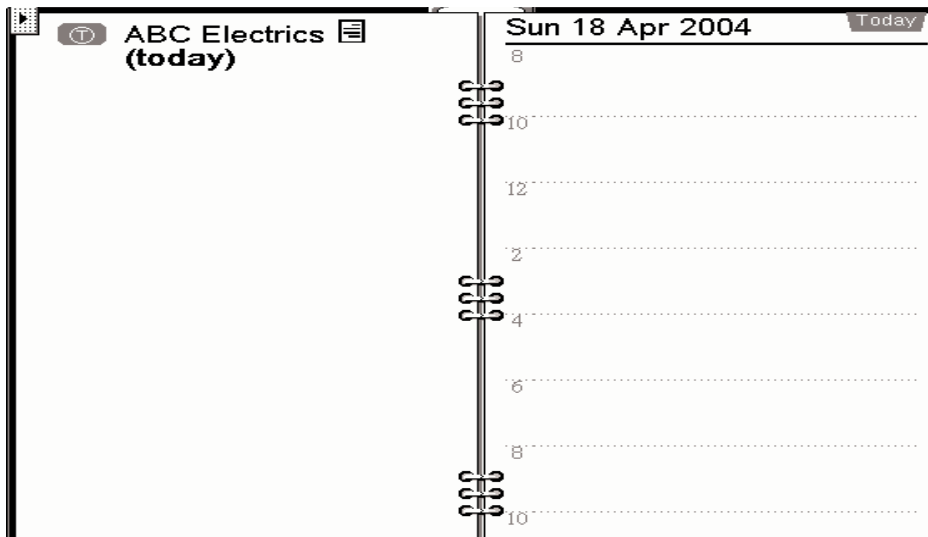
Now let's follow an example of some entries to show you better how I use this system. Let's say that I am trying to sell my products to a Company called "ABC Electronics", that the person is called Mr. A. Electric with some contact details. I open a To-Do list called "Electrical Products" and enter the name of the Company with the due date 1/5/04 :



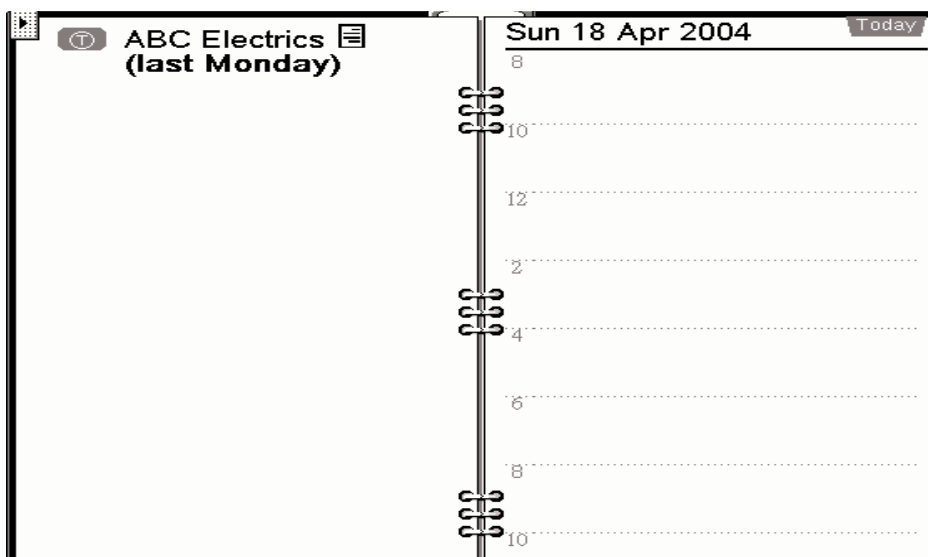
I open a WORD file attached to the entry with the contact details for example:



When the date comes to contact this person it will look as follows in the diary (I changed the date of the entry to allow it to be shown in the Today view) :



Let's say that I did not have time to contact the client and several days pass before I finally get around to do it. Now the entry in the diary will look as follows (I changed the date of the entry again) :



I finally succeeded in contacting the client and he told me he is interested and would like me to contact him again in 3 weeks to give him a quotation. I would make an entry in the attached Word file as follows :

'Word' object in 'Agenda'				Done	Article
Normal	Arial	12 pt	B <i>I</i> <u>U</u>		
Mr. A. Electric Tel: 00 - 44 - 20 - 123 4567 Fax: 00 - 44 - 20 - 765 4321 Email : A.Electric@email.com					Spell Find Insert Graph Insert Sketch Style Gallery Print
18/4: Spoken to client, contact him again in 3 weeks to give a price quotation					

and the entry in the To-Do list will now look as follows after updating the date :

ABC Electrics (10/5/04)		Mon 10 May 2004	Article
		8	View
		10	Sketch
		12	Word
		2	Find
		4	Today
		6	Go to
		8	
		10	

I think these examples show you exactly how I use the Agenda file to manage my contacts in my business life.

It makes life a lot easier if you give To-Do lists of different product (lines) a different time of the day they appear in the diary. This way you will understand immediately according to the place in the Agenda file what list your entry is on.

4. Conclusion

The above system is really rather simple after you set it up and will allow you to follow up your business contacts within the same Agenda file you also keep your meetings and other appointments. You don't need to use a new and different program with a need to synchronise this program with your Agenda file. Of course there are programs that will give you a higher degree of perfection, allow you to enter more details and retrieve them easier. However, I found this the easiest way and for my relatively simple needs it is a perfect solution. I hope some of you will find the same. For further questions about my system contact me at "itamar@post.com"

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