



April 1, 2008

Volume 5, Issue 4

Special points of interest:

- Office Space
- Outsourcing Backups
- Rebalancing made easy
- Tools for the Remote Advisor
- The Ultimate portable projector and screen
- New resources added to the archive

Inside this issue:

Making Better Use of Office Space	1
Outsourcing Your Office Backups	1
Software review: Junxure-1 Version 7.0	2 - 3
Making Better Use of Office Space (Cont'd)	4 - 5
Tools for the Remote Advisor	6
The Ultimate Portable Projector and Screen	7
Resources	8

The Efficient Practice

Making Better Use of Office Space

After wages, the single largest expense faced by financial practitioners is the office space.

Of course, if you can afford to own your office, then the costs factors are mitigated

by the equity potential of the property itself. Failing that scenario, paying rent can be a large expense, depending on your style of doing business. To save money on individual offices, some practices have chosen to build cubicles in a type of bull pit area perhaps surrounded by outer offices and conference room space. Though this arrangement addresses density issues (fitting more people into the same space) , it ignores the potential negative impacts on productivity. Such considerations as auditory interference and visual interference play a role in lessening the efficiency of such an office. When someone is talking on the telephone in one cubicle, for instance, and another cubicle is...

(Continued on Page 4)



Outsourcing Your Office Backups

From small businesses to large corporations, the critical task of PC backup can be an expensive and challenging endeavor. Fortunately, Mozy has made enterprise backup possible for everyone with its affordable, secure solution that's simple to manage and even

easier to use. Whether you're the office manager of a small financial practice, or the CEO of a Fortune 100 corporation, MozyPro is your enterprise solution for remote data backup. Your IT people will appreciate the way Mozy seamlessly integrates into your organiza-

tion's existing infrastructure, and your budget will appreciate the fact that Mozy doesn't require any additional capital expense for tapes, CDs, or hardware.

Check out: www.mozypro.com for details.

Software Review: Junxure-I Version 7.0

Is it possible for an industry leading software company to actually improve its product? The answer is yes if we are talking about the newest version of Junxure-i. As client relationship management programs go, Junxure is certainly regarded by many financial advisors as the best choice for firms of, let's say 5 or more employees that need a high degree of coordination of client data and workflow management.

For starters there is a new, easy to use dashboard that is highly customizable to the way you work, showing the information you want to see:

Clearly,
Junxure's
new
interface is a
win-win for
everyone.

Each section of the dashboard can be docked or undocked. The portfolio information, for instance can roll over to the side permitting other information to be positioned under it. The other sections can roll up to reveal information underneath. In the example above, you see several pieces of information, actions, client info, revenue and portfolio screens all movable and customizable within the dashboard. This gives each user the opportunity to position the information they want to see. This allows for each user to position information they use most frequently right in front of them on the dashboard.

The contact info screen also has a new look, with lighter, more readable blocks of information. This example shows that the contact info screen can contain a lot of information about contacting a client or spouse. In addition to phone numbers, emails and addresses, there is also a Google mapping function.

The screenshot displays the 'Edit Contact Info' screen in the Junxure CRM. The top navigation bar includes: Dashboard, **Contact Info**, Personal Info, Profile, Actions, Associates, Accounts / Assets, Insurance, Cash Flow, Documents, Estate, and Financial Planning.

Edit Contact Info

Record Owner: Everyone

Dear: [Blank]

Prof. Comm. Method: Email

No Mail:

Photo: (No Picture Selected)

Mailing Name: George and Sally Andrews

Joined Nickname: George and Sally

CLSP: George and Sally

Mail Address: George and Sally Andrews, 25 Andrews Drive, Oaks, CA 94555

Date Entered: [Blank]

Verified: 6/3/1998

Verified By: Doe, Mary

Client Score: 60.4

Date Scored: 1/30/2001

Total Assets: \$942,011.59

Total Net Worth: \$932,011.59

Total Liabilities: \$10,000.00

Total Managed: \$428,011.59

Last Actions By Type: [Blank]

Phone Numbers

Type	Number	Pri
Primary Phone	(555) 555-5555	<input checked="" type="checkbox"/>
Business	(555) 666-7777	<input type="checkbox"/>
Business 2	(555) 666-7767	<input type="checkbox"/>
Cell	(666) 667-6767	<input type="checkbox"/>
Fax	(555) 666-7878	<input type="checkbox"/>
Home	(555) 555-5555	<input type="checkbox"/>
Home 2	(666) 666-6666	<input type="checkbox"/>
Home Fax	(666) 666-7777	<input type="checkbox"/>
Pager	(565) 565-6655	<input type="checkbox"/>

Email Addresses

Type	Email	Primary	Add.
Assistant	june@net.net	<input type="checkbox"/>	<input type="checkbox"/>
Home	home@net.net	<input type="checkbox"/>	<input type="checkbox"/>
Spouse Home	home@net.net	<input type="checkbox"/>	<input type="checkbox"/>
Spouse Work	Sally@net.net	<input type="checkbox"/>	<input type="checkbox"/>
Work	george@net.net	<input type="checkbox"/>	<input type="checkbox"/>

Addresses

Home: George and Sally Andrews, 25 Andrews Drive, Oaks, CA 94555. Includes Google Maps, Print With Directions, and Edit Address links.

Business: George and Sally Andrews, Andrews Tools, 1050 Northgate Drive, Suite 570, Santa Barbara, CA 94955. Includes Google Maps, Print With Directions, and Edit Address links.

Other: George and Sally Andrews, 555 Other Address. Includes Google Maps and Print With Directions links.

One of the more annoying features of Version 6 was the Pending actions screen popping up periodically covering the entire desktop. With version 7, you get a small box in the lower right hand portion of the screen that pops up and permits you to delay viewing or to jump to the list of alerts. This pop up will display so long as Junxure is open, regardless of whether you are in another program or not.

Though this version 7 has just been released (last Monday), it has all the familiar features that have made Junxure such a hit with financial advisors. At this time, the people at CRMSoftware are still working on manuals and training material. However, the interface is easy to navigate and familiar to prior Junxure users. This new version, a SQL database that does not depend on the Microsoft Access platform any more, is quicker, more intuitive and has better features to ensure data access and security than its competitors.

For more information, visit www.gowithcrm.com.

‘Studies have shown that once concentration is broken, it can take as long as 20 minutes to get one’s mind back on -task’



Better Office Space Use : Continued from Page One

attempting to accomplish a highly analytical exercise, the concentration is often broken by the adjacent cubicle’s conversation. Studies have shown that once concentration is broken, it can take as long as 20 minutes to get one’s mind back on-task. Multiply this times however many interferences may occur in a given day and you arrive at a significant loss of staff time.

Visual interference is another form of interruptions to daily work flow. This may occur in cases where the cubicle walls are built too low permitting the occupant to see movement in the office around the cubicle. It also invites other staff members to walk up to this individual to ask questions or converse without regard to the potential interruption.

The work around for these issues is to build better cubicles (higher walls, better soundproofing) or eliminate them if possible. Putting people into individual offices, though more expensive, can increase productivity.

Another critical issue is the arrangement of the space itself. Many offices are inherited. That is, the financial advisor or business owner occupied a space previously built for another type of business operation. This can create all sorts of limitations, such as offices in the wrong locations, inadequate storage or conference space and/or offices grouped incorrectly to promote the most efficient workflow. On some occasions, file cabinets must be placed in insecure locations, despite compliance concerns, simply because there is no other place to put them. Beyond the security of private client information, the unwieldy positioning of office files placed in an area less accessible or secure than practical or necessary creates time loss when, for example, a staff person has to walk down a hall or through several doors to get to the files and walk back to their desk.

Lighting, wall colors and even floor coverings lend themselves to a more productive workspace when the colors are light, inviting and harmonious. Many studies have been done on wall color and the effect it has on staff



LED bulbs are closer to the color of daylight — which new studies suggest is good for staying alert.

Some colors motivate, while other colors can distract. Having the right colors can make your office a better place to work. If you are easily distracted, you may need to surround yourself with soft, muted colors to relax and calm you, and help you get down to work.

If you find motivation difficult, you may want to surround yourself with brighter colors to provide you with more energy. Decide which colors best motivate you, and project the right image for your working environment.

Many firms have experienced complaints from staff about fluorescent lighting in offices, as the imperceptible flicker of fluorescent lighting can negatively affect vision in subtle ways. With the phase-out of incandescent lighting, some firms have turned to newer LED lights as a more efficient and worker friendly source of lighting in an office environment. LED light bulbs give off directional light, so the light goes where you aim it. LED bulbs are closer to the color of daylight — which new studies suggest is good for staying alert. LED light bulbs can be used to replace your standard fluorescent or halogen light bulbs. The bright, white LED light produced by LED Light Bulbs works especially well for task lighting and reading light. LEDs not only produce light more efficiently, they also have a tiny mirror that reflects light in one direction. A more directed light means less wasted light.



LED bulbs have Edison style bases and will fit your existing lamps and fixtures. With LED light bulbs and just a bit of planning you can create a more interesting lighting environment while cutting down on your electric bill. If you work in an leased office, talk to your landlord about replacing existing bulbs with LED's. Once they learn about the electrical cost savings, you may find your office in a new light.

-David L. Lawrence, AIF®

One of the key peripherals to consider if you travel to a client's location is a portable projector.

Another peripheral to consider is a portable projector screen.

Tools for the Remote Advisor

Consider for a moment the impact of miniaturization. With smaller and smaller componentry, televisions have become the size of wall paintings (Hi-Def LCD monitors), Stereo systems now fit in your shirt pocket (IPOD) and your entire office can be worn on your belt (smartphones).

For financial advisors, this has spawned new, exciting opportunities. The ability to bring your office with you to every appointment and then bring it home. Portability becomes possible and mobility becomes the new operating model. So given all these new toys, what could possibly emerge that is new and exciting?

Let's look at one specific example, The video projector. Users are finding new applications daily for the new Mitsubishi PK20 LED DLP® PocketProjector™. This is the second generation of our award-winning, micro-sized portable projector. With an ultra-wide lens, the PK20 has one of the shortest image throw distances of mobile projectors on the market today. Powerful enough to project a 60-inch image, you can easily create a 20-inch diagonal screen with just over a foot of projection distance.

Here is What's New in this Ultimate Portable Projector

This class of projectors is so new they have made a special effort to listen to how you're using this unique presentation product, and then respond with new features. First, the PK20 expands its portability by adding an SD card flash memory reader for on-the-fly photo sharing or presentations. Next, the projector uses a combination of Texas Instruments' Digital Light Processing® and LED technology to increase brightness by 150 percent compared to the original PocketProjector (PK10). You'll see greater detail and increased clarity too, with a boost in contrast ratio to 1000:1. And they added audio in and out, as well as a tripod attachment.

Battery Operated to Go With All Your Mobile Devices

Even where there's nowhere to plug in, the battery-powered PocketProjector™ offers SVGA (800x600) resolution. This projector also includes RCA video, S-video and VGA inputs, plus stereo mini-jack audio in/out to connect to your PDA*, portable DVD player, laptop computer, digital camera* or video game console*. Like our first PocketProjector™, the new PK20 offers instant on/off control, virtually noiseless operation, and no bulb replacement.

Weighing in at just over 1 pound, this little projector packs an amazing punch.



Weighing in at just over 1 pound, this little projector packs an amazing punch. Available from a variety of resellers, including CDW at \$499.99.

You may wish to pair this projector up with a portable screen. Da-Lite's Mini-Fold table top screen measures 21" x 30" (19" x 28" viewing area). The Mini-Fold weighs approximately 5 pounds and folds down to fit into a vinyl carrying case (included). Frame is 1/2 inch aluminum. Fabric snaps onto the frame.



Available in Da-Mat (front projection), Da-Tex (rear projection) fabrics. Both fabrics can also be included to allow the screen to be changed from front projection to rear projection as needed. Dual Vision Fabric is also available to offer both front and rear projection with one fabric (for an additional \$20). Available from Focused

Technology (<http://focusedtechnology.com/mini-fast-fold.html>) for approximately \$189.00. It comes with the carrying case, shown above.

For quick PowerPoint presentations, using state-of-the-art tools like these, your clients will be suitably impressed.

The Efficient Practice

18313 Citation Street
Lutz, Florida 33549

Phone: 877-296-6876

Fax: 813-649-8755

E-mail: Info@efficientpractice.com

Consulting and Resources for
Financial Service and Business
Professionals



We assist our clients in realizing additional profits through a thorough analysis of your business operations from a variety of tactical perspectives that stress the efficient use of resources. We have identified [six critical factors of efficiency](#) which form the basis of our evaluative process. We do this by taking the time to learn everything we can about your business and then offer recommendations based on where you want to take it. And we offer on-going support and coaching to ensure that your path to increased profit continues unabated.

We're on the web!

www.efficientpractice.com

Access a wealth of resources:

Your subscription gives you access to tons of other resources on the internet. Simply navigate to:

<http://www.efficientpractice.com/Newsletter/newsletter.htm> to log in.

From there, you have a world of choices available to you:

1. Newsletter archive and database

2. Other resources:

topics from the world of operational efficiency:



- **Technology**
- **Employee Resources**
- **Procedures**
- **Operational Tools**
- **Efficiency publication library**



David L. Lawrence, President

Questions or comments?

Email:
info@efficientpractice.com

