



May 1, 2008

Volume 5, Issue 5

Special points of interest:

- Branding
- Solid State Drives
- Password handling
- New Portable Scanner
- New tools for the Remote Advisor
- New resources added to the archive

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The Efficient Practice

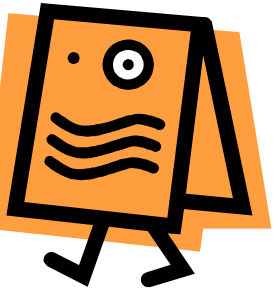
Branding: An Efficient Way to Spread the Word

Advertising gave way to marketing. Marketing has now given way to Branding. The differences may seem small, but the impact is big. So the first question is, what is a brand?

A Brand is a promise delivered. Brands do not live in ads and editorials. They live in people and ac-

tions. The reasons to develop a brand are many and varied. Here are a few:

- To become more *intentional* about making and fulfilling your promises
- *Unify* the voice, look and feel of your messaging
- Integration reduces your costs and allows you to create new communications quickly and easily,
- Consistency triggers an assessment, over time, in your audience that the firm has one voice, that you are serious about fulfilling your promises.



(Continued on Page 4)

Solid State Drives

The newest technology involves no moving parts, almost instantaneous seek times and long shelf life. And, it is a technology that has been around for a while, just not on this scale. Flash Drives, thumb-drives, etc. all use solid state technology to store data. This has

finally come to hard drive space in a big way. While, right now, costs are higher for this, it will eventually come down. The problem with conventional hard drives is the failure rate. Generally, all hard drives fail in about 3 – 4 years. Some even sooner. So, with newer solid

state drives, equipment can last longer, be more reliable with less 'crashes'. Samsung and others have manufactured larger drives (60—80 GB) for use in office computer systems. For details, visit:

www.samsung.com.

Features include an easy to understand and fast user interface

Software Review: TK-8 Safe Password Storage and Retrieval

Have you struggled with a long list of passwords and user ids with no real way to keep track of them and make changes easily? Have you wished there were an effective way to manage passwords and simplify the login procedure? Well, there is actually several software programs that might fit your needs. One in particular is TK8 Safe.

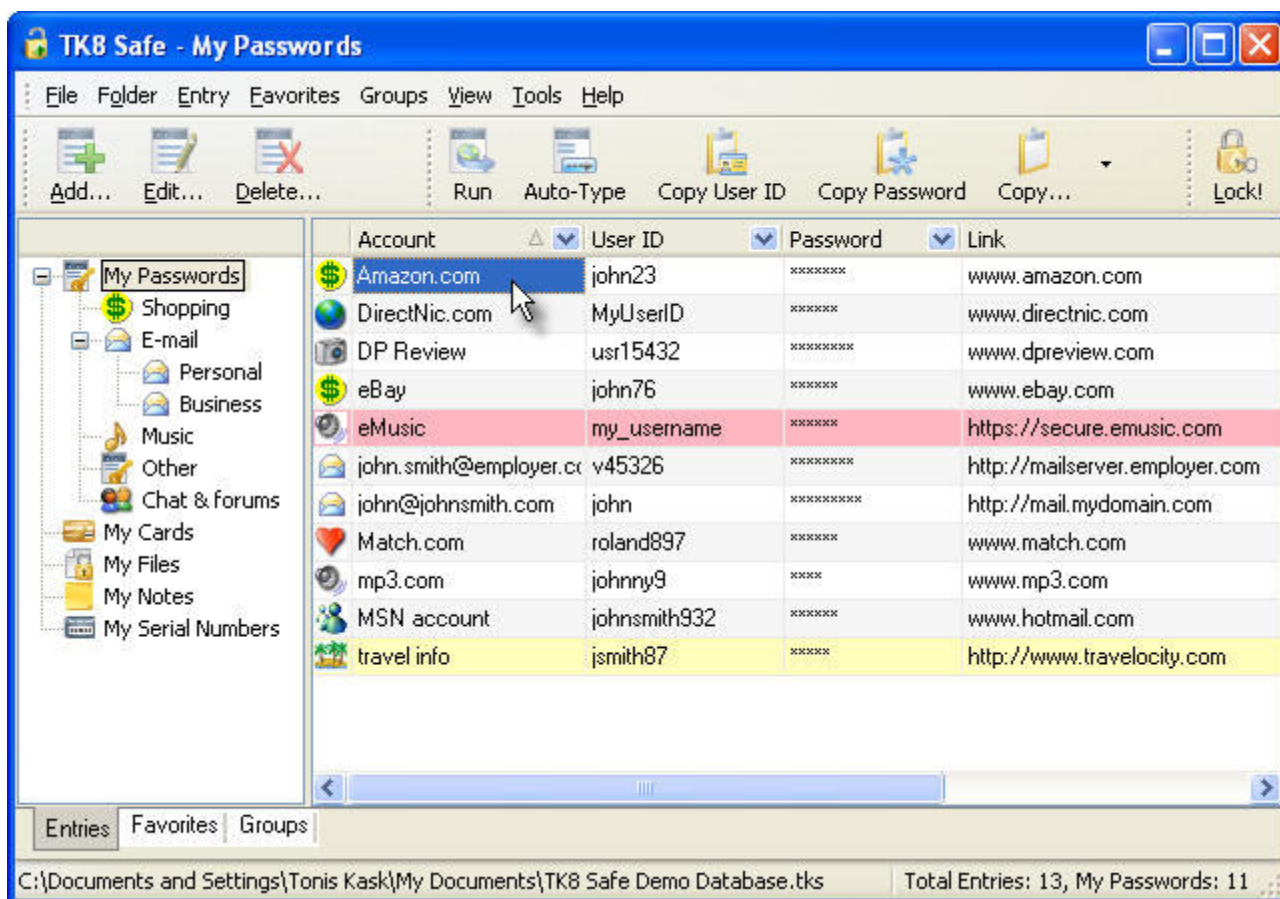


TK8 comes in either a personal edition or network (professional) version.

Features include:

- Easy to understand and fast user interface
- Single user selectable master password to access password database file
- Encrypted data files (by default AES 256 bit security). AES 128, Blowfish 448 and others available in the Professional version
- Possibility to run the program directly from removable media (like USB drives).
- Unlimited entries and folders per file
- Special forms designed to keep different information better: 1) General login entries; 2) Card entries; 3) File encryptions, 4) Secure notes, 5) Serial numbers
- Ability to store unlimited custom fields and values for each entry
- Auto-type command to fill login prompts automatically. Advanced users can use customized auto-type templates.
- Classic clipboard (copy and paste) functions
- Run command to launch web sites or file links related with the entry. Opens new browser window for this, meaning it does not change the current page you are on, if your browser is already open.
- Custom sorting, grouping and column order on the entry list.
- Quick search to find entries - just start typing on the entry list
- Advanced find and filters.
- Favorite entry list
- System tray working mode
- Tiny password bar working mode.
- Password generator to create new secure random passwords easily
- Password generation based on the templates (in the Professional version)
- Built in tool to encrypt and decrypt external files on your hard drive (in Professional version).
- Recycle Bin and Undo features
- Possibility to mask and hide sensitive information
- Locking the file automatically after unused for some time
- Possibility to export entries to Excel, Text files, HTML and XML. Importing from text files.

- File Synchronization (in the Professional version)
 - Printing entry lists.
 - Drag and drop support for entries and folders.
 - Auto backup features built in
 - Support for multiple files
 - In the Professional version: multiple users can access the same file at the same time (having full access to the file).
 - In the Professional version: user permission system, meaning feature and folder based restrictions for different users.
 - In the Professional version there is also possible to e-mail entry information, use history log and templates for custom fields.
 - Login Groups feature in the Professional version that allows you to open several web sites with one click
 - Windows XP user interface look support. Windows Vista supported also.
 - Customization options for look and feel, including custom icons for your entries and folders.
- Multi language support



The program has a very easy to use interface as shown above. The best news of all is the price. The standard version cost \$19.95 and the Professional Version is \$29.95. With the professional version, you can have multiple users accessing the same database simultaneously. This speeds up login procedures and provides documentation for website access. To learn more, visit their website at: www.tk8.com and click on the TK8 Icon.

The firm's brand is built by creating a single identity around everything we stand for, say and do as an organization.



Branding : Continued from Page One

The next question is how do you develop a brand?

The profession has a reputation for being confusing and cluttered. Marketing should not reinforce that. Streamlined, targeted, clean marketing will support the brand promise to be a trusted, credible source.

We will act like the firm we say we are. The firm needs to have confidence and authority in its marketing and communications –*simple, clear, targeted.*

Integrated marketing triggers trust

The firm's brand is built by creating a single identity around everything we stand for, say and do as an organization.

- Our brand dictates who we will let into “the tent”
- Our “brand DNA” includes our:
 - *reputation*
 - *ideology and philosophies*
 - *growth plans*
 - *lines of business*
 - *products and services*
 - *knowledge and resources*
 - *people: members, staff, supporters and affiliates*
 - *relationships with consumers, government, chapters, news media and educators*
 - *community service*
 - *marketing and communications materials look & feel successes and failures*

Branding is a holistic approach that brings together all these elements to create a compelling message.



You should find the focus of your brand and select based on whether or not it is believable, sustainable and appropriate

Defining the Brand:

When defining your brand, apply the following criteria. Your brand should:

- Communicate a highly ranked client need or want
- Be easily understood and remembered
- Not be owned already by a competitor
- Be credible and appealing

You should find the focus of your brand and select based on:

- Valued by the client
- Believable, sustainable and appropriate
- Able to create positive feelings and make people feel good about the brand
- Defendable
- Fits market's perception of brand
- Naturally connected to brand
- Different from competitors
- Proven by research to be tied to client acquisition
- Easy to remember

Piece of cake, right? Not really, but take heart, most companies go through several brand associations before finding one that sticks. Many companies intentionally rotate through several brands to retain interest. Consider Coca Cola, for instance. More than 80 brand statements have been used by Coke in the 100 + year history of the company.



Things go better with Coke

The highly portable 17oz. DS485 provides high-resolution duplex scanning with a conveniently small footprint.

Included Adobe PDF scan technology conveniently delivers industry standard PDF output

Tools for the Remote Advisor

If you travel to visit your clients, using lightweight portable solutions is a must. Ambir, a leading manufacturer of portable scanning equipment, has introduced the DS485 Duplex document and ID scanner with Adobe PDF Scan Technology.



The highly portable 17oz. DS485 provides high-resolution duplex scanning with a conveniently small footprint. The high-speed USB 2.0 interface delivers convenient connectivity and eliminates the need for an external power source. Included Adobe® PDF Scan software utility lets users quickly and easily store and share scanned items in PDF format.

Features include:

- **Cost-effective duplex scanning** – delivers one-pass scanning of items ranging from ID cards to legal-size documents at a fraction of the cost of large footprint ADF scanners
- **footprint** – consumes far less space than comparable specification flatbed and ADF scanners; ideal for both notebook and desktop users
- **Broad compatibility** – industry standard TWAIN driver compatible with thousands of software applications
- **High-resolution scanning** – new and improved to scan at 600dpi
- **Scan directly to PDF** – included Adobe PDF scan technology conveniently delivers industry standard PDF output
- **Scan speed**—7 seconds per single-sided page in black and white mode. 10 seconds in duplex mode.

The scanner sells for a suggested retail price of \$349.95. For details, visit www.ambir.com.

The highly advanced product automatically detects the latest file changes and deletions regardless of where the changes/deletions exist, then moves them to all other devices involved in the sync.



Another Efficient Tool for the Remote Advisor

Some advisors have developed nests of clients in remote locations from their main office. This may have been by design or it could possibly be as a result of clients' referrals, clients moving to another location or other client acquisition techniques. Though, having nests of clients can provide a firm with expanded revenue opportunities, it also poses significant technological challenges. One of the challenges is reliable access to files and information while "on the road." If you are the owner of a so-called "Smartphone" such as a Treo, Blackberry or similar, then you are familiar with synchronization software. Most of these devices either use Microsoft's Activesync software, Palm's Hotsync software or something similar. If you are familiar with these, you may also be familiar (or frustrated by) their almost universal lack of flexibility. To synchronize files and/or information between a desktop machine and a laptop could involve a two-step process: sync'ing the Smartphone first and then resync'ing with the laptop. Even then, not everything gets updated. Only certain files, usually associated with the software and/or functionality of the Smartphone, get synchronized. If Microsoft Outlook is the email software of choice, generally the schedule, contacts and notes are transferred, but not necessarily the emails.

So, the question remains as to what other choices might be available. On November 8, 2007, Siber Systems, Inc. announced the release of GoodSync Version 6, the latest version of its award-winning data backup and synchronization product. Despite a simplicity and power that has earned it top praise from Computer Shopper, Network World and various other computer magazines and software Web sites, Version 6 has become even faster and easier to use, thanks to a slick new graphic interface and an improved synchronization algorithm proven capable of syncing a million files at once.

GoodSync allows users to synchronize data between any two PCs or storage devices, in any direction. Backups and synchronizations can be accomplished via USB cable, over a home or workplace network, or even the Internet. The highly advanced product automatically detects the latest file changes and deletions regardless of where the changes/deletions exist, then moves them to all other devices involved in the sync—a perfect tool for updating and transferring music, videos, work files, photos or other important information.

To simplify synchronization tasks, syncs can be set to run automatically on logon or logoff using an AutoSync setting; what's more, GoodSync can be set up to automatically save a copy of a file that GoodSync is about to replace when syncing, ensuring that the last two versions of any file are maintained for recovery if needed. For those practitioners concerned with Sarbanes-Oxley compliance with offsite storage and retrieval solutions that are cost-effective and efficient, GoodSync might just be the right solution.

The good news is that this innovative data backup and synchronization utility is FREE for personal use; a professional version of the product can be purchased for \$19.95 (USD), with Enterprise and OEM pricing available. GoodSync Version 6 is now available for download or purchase at www.goodsync.com.

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