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Note:
If printing newsletter -
use landscape mode

1. Training Recap and Gaps - For all of you who were and weren't there

We had a great training series February 2-4th, and we wanted to share with you some of the content that represented significant forward movement for many of the participants. See if you can use some of the recap content to help you bridge your own gaps in getting more value from ManagePro and MProWeb.

3 Step Work Concept:

Both ManagePro and MProWeb are based upon a 3 step approach to work. Don't use the approach, and you greatly miss the value that either tool has to offer. Many people jump directly into step 2, bypass 1, and put off number 3. Interestingly, the most common reason for not doing all 3 steps is the "lack of time" and yet not doing all 3 steps seems directly related to making more mistakes and ultimately slowing the work process down. The three steps are:

1. Spend a few minutes at the start of each day to **Prioritize**, check-in, investigate, Plan... then
2. **Act**, communicate, decide, get busy doing, being aware throughout the day that nothing is really complete until you've
3. **Documented** what happened, defined next steps, measured results, or updated the status and % complete.

Database Design:

Many users create a database design that is actually difficult to work with. Goals, projects, action steps and tasks get jumbled together. It doesn't take much disarray to create a layout that's a lot more difficult than it needs to be.

Here's a couple of standards that you should adhere to for best results (also check out our database design papers at www.managepro.com/reviews.htm).

1. Make the first top level goal your strategic scorecard heading. Underneath it, list your top strategic initiatives (what initiatives, what emphasis, is being resourced to drive growth) and only include what you will measure via the scorecard capability. If you aren't measuring it, start today, or don't include the initiative in your strategic scorecard.
2. The 2nd top level goal should be defined as either: A) Operations or Departments, or B) Projects - if your company organizes it's work around projects. Either model should allow the user to get to the major projects or objectives they are working on within a couple of clicks. Action plans and tasks to complete those projects should always be indented underneath those project titles to create a logical outline flow.

Litmus test: Can any user open up the database and easily locate the projects and tasks they need to work on?

Focus:

On any given day, its hard to work on more than 3 to 6 #1 priorities. If you filter your database, are there lots of #1 items with your name assigned to them? Lots of items that are #1 and either without a due date or due imminently? Not good. The second biggest contributor to a difficult database to work with, after disarray and jumbled presentation, is too many #1s. It immediately reduces the ability of the program to help you prioritize and plan your day, much less execute what's important. If this is the case, spend the time to regularly and actively prioritize. Typically most people only assign a priority of 1 to what needs to be done within the next 1 to 5 days, or if working on long term goals, only the top three objectives to prioritize.

Help:

When you get stuck, can't get the program to do what you want - what do you do? There's a couple of great help options in both programs. In MProWeb click the Help link and then scroll down the topics which are listed alphabetically. In ManagePro, click on the Help pull down menu, then click Contents, then Index, then type the concept word you are looking for help on.

Tech Q&A | New Features

Tech Q&A and the New Features links in the ManagePro splash page are also great tools for answering most of the questions we get inquiries about. Check them out.

But the biggest help most people need, and the biggest help most people ignore or don't appreciate, is this -

The majority of users get the most value from the software when they treat it like learning to play the piano. If you want to learn, you need a teacher to show up regularly (to teach you and help you stay accountable to your goal) and you need to practice... consistently if you want results.

Whether its learning to play the piano, or put to use a powerful, multi-featured software, be sure to resource your learning curve. One person approximated the investments this way.

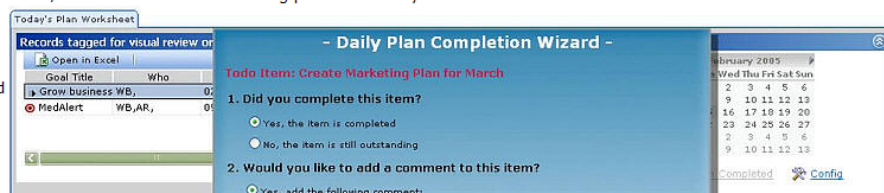
"You spend 10% on hardware, 20% on software, and 70% on training and coaching." Does that match your experience?

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2. Breakthrough "Today's Planner" Upcoming in MProWeb

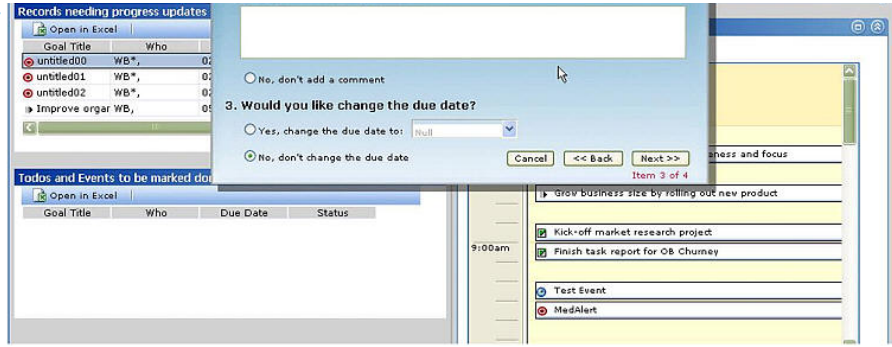
One daily task that consistently helps us all work more effectively is to plan out the day. Sure every day brings changes to every plan we create, but the process of planning and coordinating that with others is a very powerful, easy habit to help you be more effective. With the new version of MProWeb to be released in March, we've gone a long way to automating the entire process for you. The new Today's Plan prompts the user to start the day off right: to review what's important, establish priorities, and plan time and resources accordingly. On the left side of the screen, it displays a multi-paned view of current to-dos, events, goals and tasks needing progress updates, and scorecards to be reviewed. Users prioritize those items on the left side of the screen and push them into a calendar on the right side of the screen, which becomes their working plan for the day.

All of the data in the Daily Plan worksheet is derived from the strategic plan, top projects and daily responsibilities assigned in MProWeb. Today's Plan helps users stay on-track, on-time and on-focus every day. Users begin the day with a view into the day's goals, tasks and appointments; make



progress updates as the day progresses; and, at the end of the day, complete an easy, prompt-driven progress update. And, managers can receive copies of employees' daily plans and progress updates automatically, making it easier to stay on top of critical goals and projects.

Users review their plan at the start of each work day, then click the 'Daily Plan Created' button. With that click, a copy of the user's daily calendar is sent to his or her designated supervisor. Throughout the day, users can update task and goal status and calendar items and end the work day by clicking 'Daily Plan Completed.' Clicking this button at the end of the day launches a scan of all records to determine progress, changes, etc. In cases where no progress is noted, the software prompts the user to provide an update. For to-do's or events, it will ask the user:



- Was it completed today?
- Should it be rescheduled?
- Would you like to enter a comment?

For action items and tasks for which no status update is found, the program poses the questions:

- Did you work on this today and for how long?
- Would you like to post a progress update?
- Would you like this item to appear in tomorrow's daily plan?
- Would you like to change the status of this record?

As with the creation of the daily plan, completion can be configured for automatic transmission to a supervisor for review and tracking. End-of-day information can also be used to generate useful data in aggregate, such as % completion, billable hours worked, estimated vs. actual time spent per project or task, and more.

It's going to be very easy to use, and very powerful. And yes, for those of you using ManagePro, we expect to have something out similar in the month of April. Stay tuned.

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3. Want to save \$100 or more? Discounts & Give a-ways



We've come up with a couple of ways to give away a \$100 or more on some products and services! Check it out and see if you can take advantage. It's our version of March Madness. :0

1. During the month of March users of old versions of ManagePro (version 3, 4 or 5) can get a \$100 savings off the normal upgrade price.

That's right, upgrade to version 6.7 of ManagePro (free upgrades for the next 12 months included) and save \$100 dollars in the process. You must call Jona at our front office to take advantage of this special offer during the month of March. You can reach Jona at (707) 487-3000 or email her at PST@ManagePro.com

2. 3 Free 1 hour training give a-ways - valued at \$120 each!

We are going to give a-way a one hour individual training session to three users during the month of March. What would you like to learn about? Maybe you would just like an evaluation of how you've structured your database, or maybe a review of how you use the program at work? Use the hour for whatever creates the most value for you. But here's how to win the free hour.

We'll be doing a drawing for the three winners on February 28th. All you have to do is click reply on the newsletter email and put "FREE TRAINING" in the Subject line. We'll notify the winners at the end of the day on the 28th, and send you an email to schedule a time slot. Good luck!

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Hope your month of March caps a strong first quarter for you.

Rodney Beim, Ph.D.
CEO, Performance Solutions Technology, LLC

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