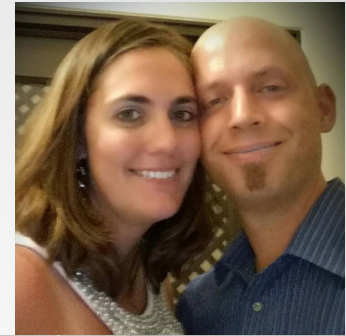


How to Effectively Use Evernote and Other Web Apps and Software

Andy Morris

Introduction to Andy Morris

- Married 10 years to Jenelle
- Foster and adoptive father of five with one on the way
- Owns Realty Trust Services full service brokerage
- 0 to almost 800 units and back to to 130 in about 3.5 years
- Intern in the Propulsion Systems Analysis Office /NASA Glenn
- Went to school for electrical engineering (and dropped out)
- Personally tested 100s of web apps





WARNING

There is a lot cool stuff to talk about. I am going to blast through my list as fast as possible. With the exception of the Evernote demo, this will be like speed dating for online apps. You will hear about a bunch of apps and their coolest uses and then you will have to decide if any of these beauties might be worth going on longer date with later with the hope of starting some long term relationships.



WARNING

I am a geek. We need to keep moving
but if I use a word you don't
understand. Please ask for clarification
for the sake of everyone else that
doesn't understand me either.



WARNING

For geek all these cool apps are like the equivalent of a putting small child in a candy store. Choose wisely only what can really help you. And don't stuff your belly full. You'll get a tummy ache.



WARNING

Spelling errors and typos
ahead.

Goal of this talk

Help property managers discover technology to make your business:

- 1) Simpler, easier and more streamlined
- 2) Automate important processes

Agenda

- Evernote DEMO
- Web / Cloud / SaaS Apps
 - What is SaaS
 - Why / Why Not SaaS
 - How to choose an SaaS app
 - Speedy survey of what is out there, categories examples in each category.

EVERNOTE DEMO

Survey:

Who here has an evernote account?

Who here is a daily user of evernote?



What is Evernote???

Ubiquitous note taking application made to quickly and easily capture all your thinking as well as help you organize and instantly find it. Early on many people used it to go paperless because it would take images and scanned PDFs and recognize text to make them searchable. Now it does much much more.



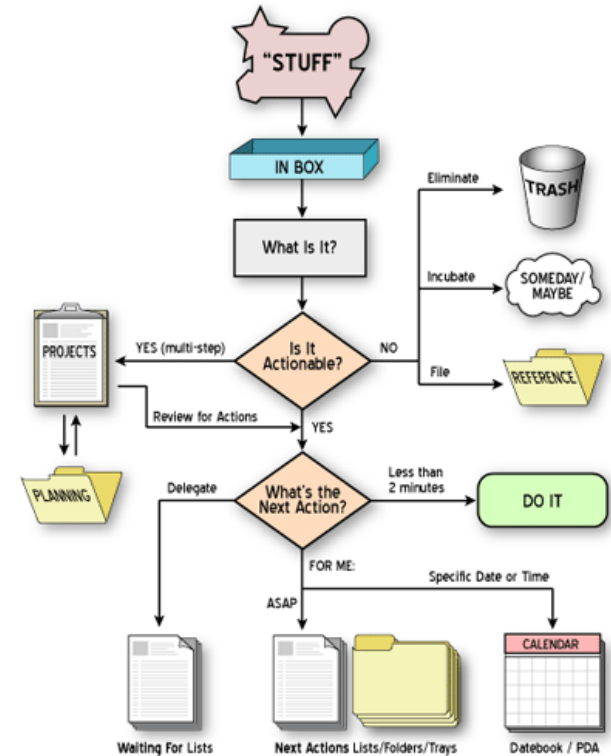
Facts

- Over 100 million users
- Valued at over 1 billion
- Tim Ferris - *“There are very few services that I feel I could not live without. Evernote is one of them...I use it 10 to 20 times a day. Evernote literally saves me hundreds of hours.”**“There are very few services that I feel I could not live without. Evernote is one of them...I use it 10 to 20 times a day. Evernote literally saves me hundreds of hours.”*
- Recommended by NARPM users
- An example of how we should be innovating our PM business



Getting Things Done

Evernote is your GTD single point of collection - your universal inbox that “STUFF” goes in. Remember I said (ubiquitous)



Web app - make note

- Login straight to quick note
- Bullets
- Numbers
- Tables creation
- Paste in table
- Check lists
- Drag and drop file attachment
- Set Notebook
- Organize with tags
- Set reminder
- Share
- Chat



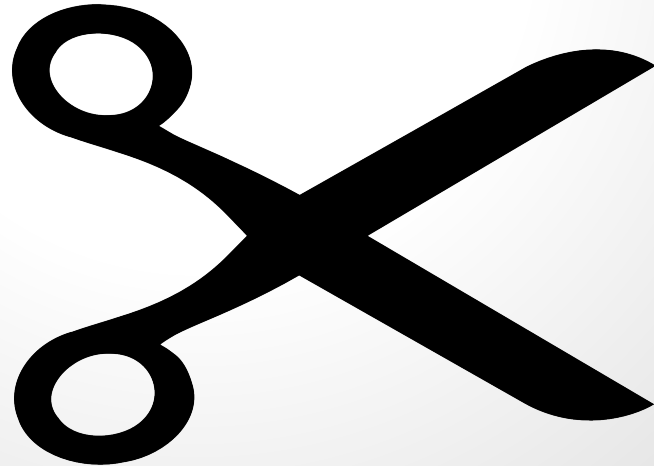
Web app - navigating

- Search
- Note view
- Note book view
- Tag view
- Star view



Web clipper

Capture articles, screenshots
and more to evernote and
annotate.



Add note from email

Send whatever you want and it is their!



Phone / tablet application

Capture on the field.

Chat and share.

Annotate pictures with touch screen

Use for property inspections and house pictures

Use for real time meetings



Desktop application

Property managers tend to be old school. They don't trust all their important information on the the cloud. The desktop version brings it all to our computer.



Keyboard short cuts

Your apps for you are like the carpenters hammer, saw and drill. Most of us aren't professional enough to master our tools.

On an application if you use a lot of keyboard short cuts could save you a day to a week of work time in a year. Evernote understands this: <https://evernote.com/contact/support/kb/#!/article/23168552>



Web / Cloud / SaaS Apps



Why

Easy scalability

- No IT department necessary (usually)
- No installation on individual PC.
- No per PC license

Why

Reliability

- Always backed up
- No viruses will take down your one database
- Professionals manage the installation and it will be on a computer optimized to run on that software

Why

Collaboration

- Collaborate regardless of work employee work location
- Gives access to mobile, at home and international work force
- Means lower cost of providing office space for workers
- Save money on salary cost

Why

Create a systematic software solution

- All users connect to same installation so there is no need to sync data between user desktops
- Constant app updates give you latest features and newest technology
- Many SaaS apps have bank level security and encryption. This ultimately makes it about as secure as anything not on the web if not more so.
- API connections bring best in class features to allow a complete solution for your business (if you choose to pursue it) via something called mashups.

Why

Implemented correctly cloud solutions have the opportunity for small businesses like us to get solutions previously only available to large fortune five hundred companies. The benefits include massive amounts of time saved, much higher conversion rates, more organization and fewer fires, less stress on your employees and the list goes on.

Why for Property Managers

- Cut down leasing preparation time and reduce errors in preparation by using a form that merges to a document.
- CRM - Send out work order survey automatically- have it send a text message out if email is not returned and trigger out a call if text message link not clicked all automatically.
- Send out leasing reports via email to your clients using google docs spreadsheets
- Get management agreements signed quicker using esignatures
- Collaborate onboarding and offboarding using project management software.
- Sync your property management software with multiple gmail accounts which syncs with your phone system which then tells you who is calling.

Choosing web apps to use

Pricing (warning nothing is really free - the biggest cost will be your time and cost to get users to adopt). As my business grows will this pricing work for me? What will the time cost be for adopting this software? How much more profit can I make? How much time can I save?

- freemium
- per user
- per usage
- When (often times pay money by paying up front - be careful if you haven't tested)
 - monthly
 - quarterly
 - yearly

Choosing web apps to use

Usability vs lots of features / automation

- **Usability gives immediate pay off. Automation** and extra features have the opportunity to exponentially **increase productivity** but are exponentially **harder to implement**.
- Choose based on your own **technical aptitude** and that of your team - as well as your **long term vision for technology** in your company.

Choosing web apps to use

Reliability and support -

- read reviews
- google it -
 - Complaints about up time
 - Complaints about support
 - Complaints about complexity

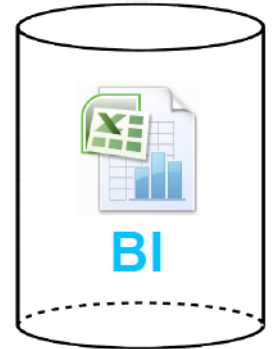
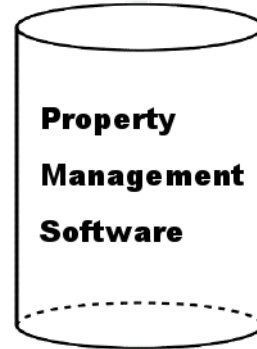
Choosing web apps to use

Current development schedule - Is this software languishing or are the developers of it constantly innovating to make this the continue to be best there is.

Choosing web apps to use

Data Silos

- Will this make take my data and **separate** it from the rest of my database or does it work complementary with my current business technology to augment it and add to it?
- Can I use this to get rid of other software and processes and consolidate and **simplify** my software and processes?
- Ultimately we need to look for how the new software works with the technology we currently have and our current processes



API



Application Protocol Interface - For the purposes of this presentation it is how web apps talk with one another and interface. I always look for web applications that have a robust API with the ability to interface with other web apps and thus reduce the **data silo** effect.

What is actually out there?



Property management software

Many great options. Choose the right balance of flexibility, price and features. Look for something that will mesh well with other choices.



CRM

1. Basic contact database plus
2. Marketing automation



Contact database plus

- Insightly.com - Free basic plan allows you to share contacts, syncs with google contacts and you can schedule appointments etc.
- Batchbook.com- This one has been around along time. It is a nice basic CRM.
- CapsuleCRM.com- Similar to batchbook.
- Nimble.com- Known for connecting to multiple social networks and giving you updates that you can use to engage and increase your sphere.
- Many more

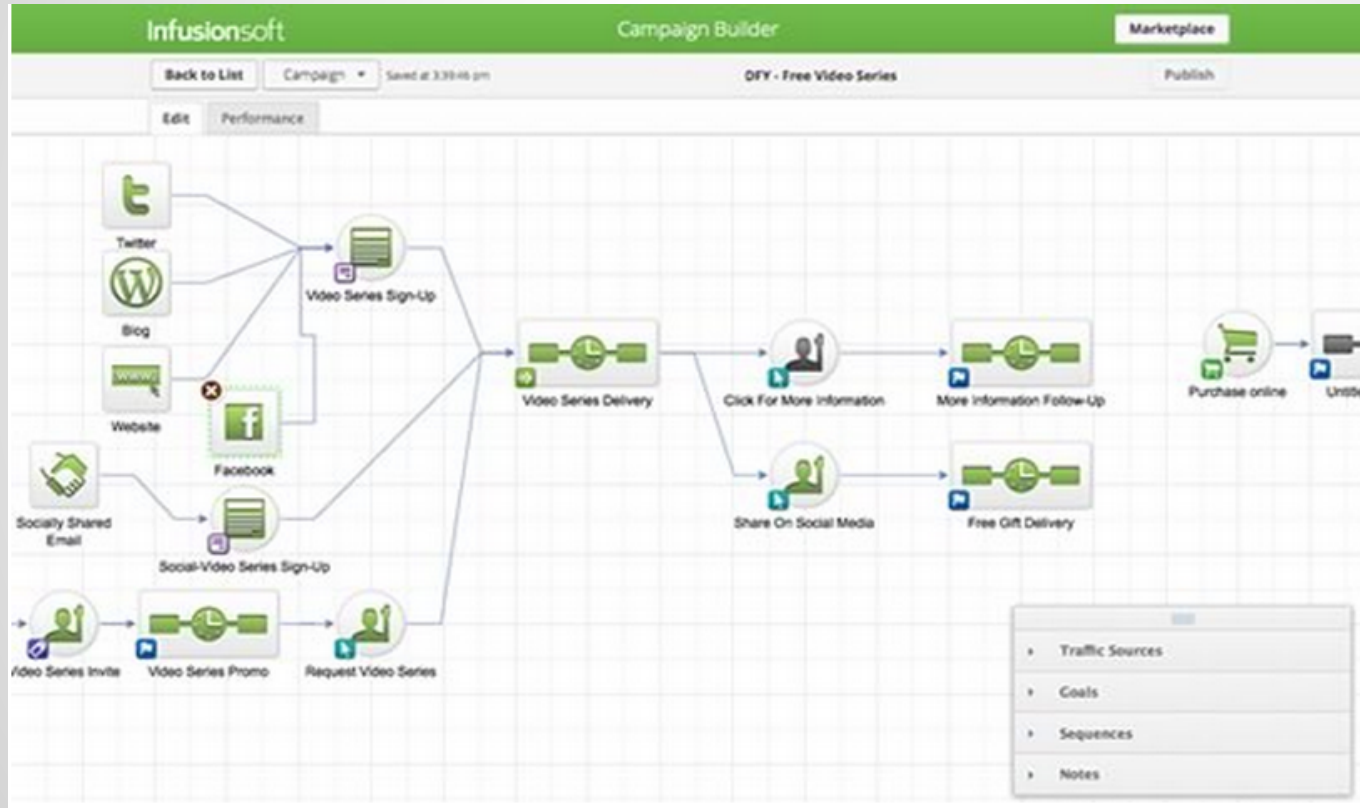
Marketing automation

This category of software allows the non programmer to do automation in the marketing arena that used to be only available to large corporations with 7 figure marketing budgets. When correctly set up and used this type of software can dramatically lower the cost of acquiring new property management clients by sometimes a factor of 10 times or more. One of the awesome things about these softwares is that by monitoring engagement in a variety of ways it can then vary the marketing and proactively re-engage customers as well as alert sales professionals of needed in person follow up for prospects identified as hot or potentially ready to go.

Marketing automation

Infusionsoft- NARPM member. Essentially created the marketing automation category of software and has continually innovated. It is not the easiest software and not the cheapest (\$200 plus a month plus \$1500 plus to sign up) but it has a large user base and a large number of consultants including Dee Alamonge from Landlord Source also a NARPM member. Infusionsoft pioneered the drag and drop automation flow that is starting even to be seen in other software vertices that don't include marketing automation. I won't use a crm that doesn't include drag and drop automation workflow.

Visual workflow example



Marketing automation

Agilecrm- Up and coming CRM. There are no setup fees and it has an incredible number of integrations. Much cheaper than infusionsoft. Plans range from \$10 per month to \$80 per month per user.

Marketing automation

X2engine- Open source. It is can be gotten hosted for about \$50 per month. It has great flexibility and the ability to push data on your web page dynamically depending on who you are and what you have done as well as send email sequences and post data out.

Marketing automation

Chamberzoom- This is a white label version of Greenrope.com and can be gotten for \$20 per month ($\frac{1}{5}$ of the cost). It has some great integration and features but lacks the drag and drop workflow. It is supposed to get that this year according to developers. If so this will be the cheapest out there as far as marketing automation goes. It does still have some very advanced automation especially for emailing and email sequences.

Cloud connectors

- **Zapier.com**- Connectors list some of the sync connectors
- **OneSaaS**- Sync data over multiple apps.
- **IFTTT**- If this then that. Logical triggers from app to app using API.
- **Memotoo.com**- Sync contacts for unlimited google accounts for very cheap.

Email parsers

These will read through your emails and pull out formatted data and stick it into your CRM or other automation systems. For instance it could look for allpropertymanagement.com leads or leads from your website lead form and then post those directly to zapier.com which then sends data to twilio.com API which then sends that person a text message. The sky is the limit once you have put the data into your automation system. The key is making it happen instantly to create a seamless customer experience. This makes it instant.

- **Emailparser.io**
- **Parser.zapier.com**
- **automatedemailparser.com**- Not SaaS but works the same and is free
- **getdispatch.com**

Communication APIs - Snail mail, postage, purchasing, SMS and voiceblast

These services allow your other web programs to talk to them and automatically send out postcards, letters, send texts and even buy stuff on amazon for you (i.e. in your marketing automation system all clients with a certain lead score get a christmas postcard or gift on amazon.com). You can send these out in marketing sequences and target only people you know to be prime prospects. Think of this as a way to extend email autoresponders into true multi channel marketing and reach people where they are at. Doing this can dramatically increase engagement and conversion with the folks in your database.

- **directmailmanager.com**- full color merged post cards very cheap
- **postalmethods.com**- Allows automated letter sending. Reasonable prices and used by property management software buildium.com- when you use their fulfillment services.
- **zinc.io**- Amazon purchases via API
- sms and automatic voice outs APIs
 - twilio.com- Most used web telephony API
 - tropo.com- Similar to twilio
 - anveo.com- Has full telephony application as well as robust API
 - callfire.com- Great set of stand alone telephony applications and APIs

Email: Online clients and email providers

Gmail- My favorite. It is extremely agile and quick and includes lots of integration as well as keyboard shortcuts. I believe it is more powerful than the desktop clients like microsoft outlook.

Outlook online and hotmail

Yahoo.com

Email: Helpdesk software

- Team support via email and phone
- All team members see all communication
- Follow up reminders
- Monitor support response times
- Email response templates
- Self help knowledge bases

Email: Helpdesk software

- **Keeping.com**- In BETA but has made gmail into a basic help desk. I am experimenting with them now and like what I see so far.
- **Zendesk**- Popularized help desks with small businesses. Not cheap.
- **Besnappy.com**- Simple inexpensive help desk. I like because it allows API triggers out.
- **Helprhino.com**- Unlimited users \$50. Decent API.
- **Helpscout.com**- Great basic help desk.

Email newsletters, autoresponders and marketing

- Mailchimp- hands down the best at this genre and it is free
- Aweber.com- Known for its old school email sequences
- Constantcontact.com- used by many in the real estate industry.
- Also see most of the marketing automation solutions mentioned previously as they have good newsletter capabilities

Telephony: PBX & office phone systems

- **Anveo.com**- Can use it to run an entire office phone system and connect your cell phone in it to make calls on your cell phone that look like they are coming from office. They also have very advanced drag and drop call flow control with over 40 modules that allow automatic text sending, automatic email sending, the ability to look up a contact in your google contacts and then very response based on that. Pretty much the sky is the limit. They have a very robust incoming and outgoing API. Also has very good recording features and can post out recordings. Support is not so good.
- **Ringcentral.com** - This is a well known brand with a lot of options.
- **Telzio.com**- A bit cleaner than anvio. Has drag and drop workflow. Customer service is much better.
- **Voip.ms**- is a VOIP provider with a full line of basic telephone services including internal extensions. You can set up an entire office phone system without having to purchase and maintain a box.
- **Vitelity.com**- Similar to voip.ms they offer wholesale VOIP services and offer basic PBX functionality like IVR menus and SMS messaging.

Telephony: SMS and text blasts

- Callfire.com
- Anveo.com- includes email to text and text to email gateways.

Telephony: Voice broadcasts

- Callfire.com
- Anveo.com
- Many others

Telephony: autodialer / call center

These apps will allow someone dialing a list of people to talk to 2 to 4 times the amount of people they normally would using several different features. The benefits if you do collections or outbound sales are tremendous. Most of them have an integrated basic CRM. Warning most autodialers are complex and have a steep learning curve.

- Fenero.com -
- Callfire.com
- Flve9.com
- Safesoftwsolution.com

Telephony: Office phone systems

Normally these work with Yealink phones which seem to be the most popular and reasonably priced of office voip phones for small businesses.

- **Ringcentral.com-** One of the features that this has that Anveo.com does not have is BLF which stands for blind light feed. Basically it is the light on the phone that tells phone statuses for all the office phones.
- **Freedomvoice.com-** One of the first services to offer phone systems to small businesses online without forcing them to purchase expensive equipment. Always worth checking out.

Telephony: Open source and on your server

99 percent of people would need a consultant to set these up.

- Freeswitch - Includes many graphical interfaces like Bluebox, and 2600hz Kazoo.
- Asterisk- Include graphical interfaces.

Telephony: Screen pops

- **Ringcentral.com**- has an app that pops up the screen. It can do pull data from google contacts and other CRMs and can even load a webpage url with the calling phone number in it which could make for a simple mashup even with something like appfolio.com. https://realtytrust.appfolio.com/search/advanced_search?full_text_search=4407875372
- **Anveo.com** has a windows tray application that pops up.
- **Agilecrm** has a VOIP integration that allows you to add recordings as well as give pop up on your crm when a call comes in.
- **ScreenPop** is a desktop app that will integrate with most SIP based voice over ip services (the services being talked about here) and it will do various lookups of data when a call comes in.

Telephony: Instant lead connect

When you are paying for web traffic or purchasing web leads, the half life of the lead is sometimes as low as 5 minutes. This means that if cost of lead was \$30 bucks it became half the value (or half as likely to convert) if you waited longer than 5 minutes to connect. These services will take data from a web form or information request and call up you or your business development / sales rep. It will read the form to you and then allow you to press one to connect. In this way you can connect with the person before they are even off your website. The awe this invokes can alone make your conversion.

- **dyl.com**
- **leadactivate.com**
- **marketing automation mashup-** most of the marketing automation software I listed can easily reach out to twilio.com, callfire.com or anveo.com API to do this. You might have to pay a geek to show you how but it is pretty simple.

Project management

- **asana.com**- I use this. It has a great user interface. It was created by one of the co creators of facebook. It is free.
- **trello.com**- Free. Modern and popular tasks lists software. People love the intuitive visual board flow.
- **basecamphq.com**- One of the greatest
- **teamwork.com**- Have had this recommended by guru on business processes. Has great task template functionality.
- **flow.com**- Have seen NARPM members recommend this.
- **Microsoft SharePoint**- Kevin Knights favorite. Ask him about it.
- **Kissflow.com**- For specific applications where you want to carefully control the workflow. It isn't a task list but actual business process automation. You can flowchart a process and then create forms and API integrations and literally once you start a process it will move from person to person and automatically and allow special reports on where a process is and what the blocks in the flow are. Similar to SAP (billion dollar German ERP company) but for small businesses with a process oriented mindset.

Screencapture and screen recording

- **screencast-o-matic**
- **screencast.com/ jing**
- **screenr.com**

Route management

Great for when you need to deliver 3 days or otherwise drive by a bunch of addresses.

- **Road warrior for android-** allows up to 150 locations. allows for notes and tasks to be checked. routes can be shared by multiple phones and people can work on a single route simultaneously. \$5 per month regardless of phones using. Allows you to upload a csv list of addresses into a route.
- **route4me.com** for iphone

Cloud storage

- **Dropbox.com**- most well known for cloud storage. has some benefits over google.
- **Google drive**- nice if you are already a google person which I am.
- **box.com**
- **Evernote.com**

Spreadsheets and other shareable docs

- **google docs-** Great user interface. Has become the online docs standard. A lot of cool interface abilities and the scripting can allow for some cool automation.
- **office.com/online-** microsofts full office suite is online. If you are tied to microsoft you will like it although you have to pay for it. People like having access to classic microsoft apps everywhere they go and on whatever computer or device they use.
- **zoho.com-** Has its own suite which works with their CRM

Meetings / teleseminars

- **Google hangouts on air-** free and its google. Makes recordings and many people use it to do interviews which they use for marketing content as well as collect video testimonials.
- **gotomeeting.com-** Expensive but very effective
- **instantteleseminar.com-**
- **freeconferencecall.com-**

Blog / website / content management

WordPress- this is the only way to go in my opinion. There are other platforms but you should use wordpress as it is the most used and has the biggest number of workers that can change and edit for you out there. It is the undisputed champion of websites and content management. Fortune 500 companies down to mommie bloggers use this as their platform of choice.

Esignature solutions

Rightsignature.com- has some infuriating bugs but it is the cheapest all office solution (10 users \$50 per month).

Echosign.com- Has become the Esignature standard since being acquired by Adobe the creator of the PDF document standard.

DocuSign.com- Was one of the first to come up with esignatures. the interface is smooth and easy to use. It is the esignature program of choice by most real estate agents.

Dotloop.com- Has created an end to end document management, contract negotiating and esignature solution. It has secured contracts with Keller Williams national as well as many large brokerages and has become a wonderful resource for real estate professionals

Document creation

- webmerge.me- I use this software to create custom leases which are then packaged and loaded automatically into rightsignature and sent out for signature. It is incredibly powerful and flexible and could allow you to say create offers for every house on the MLS or create leases or fill management agreements. It has a lot of if this then that type functionality that allows you to get incoming data from a variety of sources and then create documents and push those documents into another flow.
- **Ultradox** - Specifically made to function in the google drive ecosystem Ultradox has the ability to do mass merge in a variety of different ways using google documents and spreadsheets.

Accounting- In addition to your property management software you may have other accounting needs.

Quickbooks Online- The small business accounting standard. Intuit has recently modified to make for a reasonable user experience. There are numerous other programs that interface with quickbooks online.

kashflow.com- an quickbooks alternative

xero.com- a quickbooks alternative

Calendars and scheduling

- Google calendar
- IOS calendar
- CALDAV- this is the standard that IOS and Google calendar use to sync and feed data across multiple devices and apps. Look for apps that connect their feeds this way.

Calendars and scheduling

Automatic

- appointlet.com
- okfresh.com
- doodle.com
- appointly.com
- simplybook.me
- timedrive.com

Calendars and scheduling

Rental / real estate specific

- **Showmojo.com**- created to allow automatic scheduling with rental agents. Offers a lot of extra functionality including very inexpensive automatic lock box integration via Codebox.com. NARPM member.
- **Rently.com**- NARPM member. Innovated the automated showings using electronic lockboxes. Also offers a scheduling call center.
- **Codebox.com**- offers very inexp
- PM software **Propertyware** (and probably others) will sync calendar with your google calendar.

Browser plugins

These are little plugins that run in your browser like chrome or firefox and increase the functionality of your browsing experience.

- **Boomerange.com**- this and other apps like it allow you to take gmail emails and send them at a certain time or make them come back into your inbox at a certain time.
- **Yesware.com**- similar to boomerange this app gives you team canned messages and lets you track email opens and views and bring email messages conditionally based on this.
- Contextual plugins
 - **Rapportive.com**- This was killed when linked in purchased it. But they innovated the contextual plugin. Essentially it would show social media, CRM and other important data next to a contact when you saw it in your web browser. At this point it will only show linked in data. You can search for other alternatives and there are some but none that have caught on like the original.
 - **Andys plugin**- I currently have a developer working on a contextual plugin that will use the old rapportive functionality as well as new functionality to display contextual information for incoming phone call,s caller id, incoming emails addresses, and contact data displayed on any web page. Using a plugin infrastructure it could do things like pull data from your property management software (recent work orders, recent notes, units owned, address residing in, balance owed, eviction status etc), look up related tasks in your trello or asana, see calendar entries with this person, previous phone call history from your phone system, google docs mentioning this person, list of recent emails in gmail that you and your team have had with this person, see recent texts exchanged and the list goes on. It basically could create an instant dash board around any person that you are interacting with thus eliminating the typical “silo effect” which happens when you have data about someone spread over multiple items. Email me at andy@PropertyManagementOH.com and I will put you on a list regarding this.
- **Evernote clipper**- takes data from the web and adds to evernote

Inspection software

- Appfolio
- Propertyware
- Zinspector
- Happy inspector
- Simple inspector
- Many more

Video sharing

- **youtube.com-** is not just a video sharing site. it also allows video editing and has many uses for the property manager. some people use other sites for specific content purposes.
- **drive.google.com-** You can use google drive for sharing video inspections. I however typically use youtube for all my videos. The private folder structure is more conducive when just wanting to share some data with a client or other team members.
- **vimeo.com-** This is just to add a non youtube alternative. mostly artsy fartsy types use vimeo.

Social media

- **Twitter.com-** Post your properties for rent. comment on news.
- **Facebook.com-** Obviously the biggest social network. You have to be on this and have a company page.
- **Linkedin.com-** Seems to be a good place for networking with business users. I don't get a lot of business from this.
- **Google plus business page-** This is very important if you want to show up high for “your city property management” search that brings a lot of business.
- **Youtube.com-** is probably our busiest channel.
- **Your personal web blog-** All social media and email newsletters should point towards this piece of web real estate

Social media management-

Use social media management tools to assist you in scheduling posts and or alerting you to engagement opportunities. These are especially helpful if content marketing and or reputation marketing are a big part of your marketing plan.

- **Hootsuite.com-** This is probably the most well known of social media tools. You can use it to schedule posts on facebook google and twitter and automate many social media tasks.
- **Tweetdeck-** Schedule and engage on twitter
- **Sprout social-** A variety of social media tools.
- **Google alerts-** sign up for alerts on your company and your competitors as well as relevant topics that you want to cover in social media or repost.

Edit PDFS

- PDFEscape.com- Allows filling in of forms and editing of PDFs.
- [Pdfzorro.com](https://pdfzorro.com)- Quick join, split and mark up.
- Pdfbuddy.com

Visual drawing and presentations and note taking- as well as mapping

- **draw.io**- Flowcharts, mind maps on google drive.
- **gliffy.com**- Great charting app.
- **mindmeister**- Mind mapping.
- **mind42.com**- Mind mapping free.
- **prezi.com**- 3d zooming presentations.
- **Evernote**- Note taking and collaboration.
- **Google presentations**- Slide show app.

Profile sharing

ourteam.com- Allows people to download your contact data to your mobile phone or email system from business cards or email signature links.

URL shortening

These really help you share complicated links with people in emails and printed materials. Most shorteners come with QR code creators as well to aid in sharing links to mobile phone users.

- **Bit.ly**- Popular shortener.
- **goo.gl**- Also very popular shortener.
- **Yourls**- Your own branded shortener (i.e. for me I use Yourls on my server rtsl.us).



The future

If you can think of a clever idea, it will probably be created soon by someone else. Keep an eye out for what you are looking for and it will soon be there at a cost cheaper than you expected. Maybe consider developing your own idea like I am.