

THE TOOLBOX:

16 Tools That Will Help You Save Time,
Increase Productivity, and Get More Done



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1

10 reasons why I love Evernote

Evernote was an unknown tool to me just few months ago. Now I can't imagine doing my work without it. It has become my back-up brain, and my only hope of keeping pace with the level of content I process each day. If you're someone who processes a lot of content, ideas, and finds yourself saying, "If I can only remember where I put that...", then this tool is for you.

Here are 10 reasons why I love Evernote:

1. I can take a picture of a whiteboard, tag it with the client's name and date, and never have to go searching for it again.
2. I can capture a voice note right after a phone call or meeting with a client with my iPhone.
3. I can "clip" any Web page directly from Safari and never have to worry about wasting time searching the Web hoping to find it again. (This is great for gift ideas, research, etc.)
4. I can share folders with people I'm collaborating with on client projects immediately.
5. I used to keep running documents of client notes, meetings, and agendas. Now I keep all of that in Evernote which means I can find what I need faster and never worry about searching for it again.
6. Everything in my Evernote account is available to me whether I'm on my laptop, phone, or other supported device.
7. I can create to-do lists which provide a great way to track progress of client meetings or projects. (I'll do another feature on "Things" as a project management tool later.)
8. I can search over everything, including PDFs, through the global search feature.
9. I can e-mail my notes to anyone. I can also e-mail (or tweet) notes directly into my Evernote account.
10. I no longer have to worry about keeping up with mountains of post-it notes from conversations, moments of inspiration, etc. I just store it in Evernote and can forget about it until I need the information again. Freedom!!

Give Evernote a try. It's free! And the [premium version](#) is worth every penny.

2

4 advantages to the Livescribe pen

If there was ever a doubt that I'm not normal, then let me put your fears to rest. I was so excited to get a [Livescribe](#) pen for Christmas that I just about stopped everything to figure out how it worked. Since then, it has become something that I use regularly. Let me tell you why.

There are four distinct advantages that the Livescribe pen offers me:

I can write notes which keeps an interview or meeting personal. I've gone back and forth about taking notes using my laptop, iPad, etc. I feel most comfortable with a pen and paper. It's keeps things simple.

I don't have to worry about keeping the notebook after I'm done. I'm committed to a paperless environment. So what am I supposed to do with notebooks once they are full? With Livescribe, I can download the notes onto my laptop and dump them into Evernote. Then I can trash (umm...I mean recycle) my notebook.)

I can capture audio at the same time. Then, I just have to tap on the word to begin replaying the audio recorded at the same time I capture my note. Ever written something down and can't quite remember what was being said at the time? Now you never have to worry about that again. It works!

I can share my notes and/or audio with whomever I want (the whole world or one person) through a Podcast. I've used this when I'm working with a partner on a client project or to remind a client what we discussed.

I'm definitely a Livescribe fan! Check it out. It won't disappoint.

3

8 ways Freshbooks saves me time

One of the many differences between being self-employed and being an employee, is the fact that you must generate invoices if you want to get paid. It is the universal vehicle that prompts accounting departments of all shapes and sizes to generate a check for your services.

For anyone who has tried to keep pace with running a business (which would include invoicing) and fulfilling client needs, you understand there is a great deal of tension between the two. The end result is that something usually gets pushed to the quiet hours of the morning or very late at night.

I discovered a tool I've been using for almost a year that has saved me the most precious thing that I have to give...my time. It has greatly shortened the amount of time I spend each month invoicing clients.

Here are eight ways that **Freshbooks** saves me time:

1. Freshbooks is located in "the cloud." Yep. That means I can access wherever and whenever I want or need to. There is also a great deal of integration with other popular cloud-based services.
2. Freshbooks is mobile. I can interact with it on my iPhone or iPad.
3. Freshbooks allows me to create auto-recurring invoicing for my retainer clients. I set them up once per our agreement and Freshbooks creates and sends each invoice automatically based on the frequency schedule I establish.
4. Freshbooks allows me to choose to send the invoice via e-mail or snail mail. In fact, for a small fee, they'll even take care of printing, stuffing, and mailing the invoices if I have a client who refuses to accept e-mail invoices.
5. Freshbooks automatically creates late notices based on the intervals I set and using the language I craft.
6. Freshbooks offers me many customization options so it fits my business rather than my business fitting Freshbooks.
7. Freshbooks automatically alerts clients when I've received their payment.
8. Freshbooks allows me to track time and convert that to an invoice line item. I can also have any sub-contractors I hire bill me through Freshbooks for a streamlined process and for ease of attaching their costs to my clients by project. In turn, I can invoice accordingly.

Have you tried or are you currently using Freshbooks? Thoughts?

4

5 ways Instapaper helps me manage content

I monitor about 200 blog feeds per day. That doesn't mean I read all of them. But this is a list that I've cultivated over the last five years. I add a few and delete a few from time to time. This list of blog feeds is core to content generation because it keeps me focused and in touch with what's being said, who is saying it, what to watch for, and what topics or ideas don't matter.

Until **Instapaper** came along I was using Del.icio.us. (Remember that?) It was the first social bookmarking service that became very popular just a few years ago.

Instapaper helps me manage content in five specific ways:

1. Instapaper is simple in design and concept which makes it easy to use and implement. I need simple. I can also export that information stored in my account should I decide to no longer use the service.
2. Instapaper allows me to store content I'm skimming for easy access and further review in the future.
3. Instapaper allows me to save blog posts directly from Google Reader or from my Web browser with the click of a button. (You can also e-mail your content to your account.)
4. Instapaper allows me to organize my links into folders where I can sort the links I collect based based on the clients I'm writing for. Then, when I need an idea for content, I go search in the client folder I created.
5. Instapaper can be used and accessed using my iPhone, iPad, and MacBook Pro.

Are you currently using Instapaper? Thoughts?

5

3 reasons I purchased HyperMac

I debated for almost a year about whether or not I wanted to purchase an external battery. Whether you are in a coffee house, a conference room, or an airport, the number of electrical plugs available are always less than the demands of the people in the room. I can't tell you how many times I've had to stop working to save battery life on my MacBook Pro, iPhone, or iPad because battery life was getting dangerously low.

Then, I had one of those experiences that pushes you over the edge. I was done battling, jockeying, and competing for a limited number of outlets. I was ready to buy [HyperMac](#) (currently being rebranded as HyperJuice). Of all the options available, this one is the most expensive but has the best reputation and the most versatility. I based my decision on these three factors:

1. I needed it to power my iPhone, iPad, and MacBook Pro. I found a lot of devices that would power the iPhone and even the iPhone and iPad. But not all three.
2. I needed it to be easy to carry. In other words, I don't need a brick to put in my bag to add exceptionally more weight and bulk to my bag.
3. I wanted it to have a seriously long battery life so I could finally be free from the outlet.

HyperMac isn't cheap, but it's worth every penny. You won't be disappointed!

How do you deal with battery life issues on your phone, tablet, and/or laptop?

6

5 reasons why I use HootSuite

When it comes to managing social media streams and content production, there is only one tool that I turn to: [HootSuite](#). Here's why:

HootSuite allows me to...

- ...manage multiple social profiles.
- ...easily create columns to help me grow bigger ears.
- ...track the effectiveness of my social media activity.
- ...publish RSS feeds to specific social profiles when I want them to.
- ...manage my account via my iPad, iPhone, or Web browser. (They now have a desktop app, too.)

If you're looking for an industrial grade solution to manage your social media activity, give HootSuite a try. You'll love it!

What tool(s) do you use to manage your social media activity?

7

7 reasons to use Google Apps for Business

I'm always surprised when I run into other business owners who aren't using [Google Apps for Business](#). Because e-mail is so critical to my business, I can't afford not to use the best option out there. I was already using Google for personal reasons. After having been part of the testing team that switched to Google Apps for Business when I was back in cubicle nation, I was convinced that when I launched out on my own I would do the same.

If you're not using Google Apps for Business, let me give you seven reasons to consider switching:

1. You no longer need an IT consultant to manage your e-mail server.
2. You get a suite of office tools (e.g. Google docs) with your account.
3. The administrator has all the traditional account controls as your server-hosted solution.
4. It costs \$50/user a year. (If you're a nonprofit, you can apply for a free account.)
5. You get all the brilliance of Gmail.

6. Google Apps Marketplace allows you to seamlessly integrate with other solutions you're already using (e.g. Salesforce, Box.net, etc.)
7. You can brand your account with your logo.

Are you already using Google Apps for Business? Would you recommend it?



11 ways Shoeboxed.com helps me “go paperless”

[Shoeboxed.com](#) has quickly become an important part of my workflow. I've made a commitment to “go paperless” which can be a struggle, especially when it comes to lengthy project documentation, client material archiving, and expense receipts. Shoeboxed.com provides a great alternative to sitting at my personal scanner all day.

My favorite part of Shoeboxed.com is that...

1. I don't have to scan expense receipts at the end of every month.
2. I can e-mail what I need scanned to my account, upload directly from my computer or iPhone, and even mail them in (on their dime) and have the documentation scanned by hand.
3. When you mail your documentation in you can choose to have them send you the paper copy back or they will recycle it on your behalf.
4. I don't have to manually organize the receipts.
5. I can organize them based on my business, not general categories. This helps give me good feedback about my expense projections and my actual receipts.
6. I don't have to keep endless amounts of paper in boxes forever and ever. All the scans are legal and approved by the IRS. That means they can stand up in court and in a formal audit.
7. I can back up all my receipts to my Evernote account.
8. I can instantly create an expense report to send my accountant that is organized and has all the receipt images attached.
9. It's in the cloud, so I only need internet access.
10. I no longer have to worry about keeping client reports or documentation that is exchanged during an engagement. Many times it is completed by 3rd parties, so I don't have the original electronic file.
11. No more time wasted manually scanning large amounts of paper which means I can stay focused on client work.

If you're tired of keeping boxes of paper stored any number of places, then Shoeboxed.com will help you unpack those boxes and “go paperless” today!

9

Why Dropbox rocks!

Dropbox is an invaluable tool in my work. I travel a lot. I'm in a lot of different places. When I need access to a file, I usually need it immediately. Plus, I office out of my home, so having file cabinets line the walls of just one room of my house is not practical. These (and many more) are the reasons why Dropbox rocks! Let me share with you why I use Dropbox:

1. Dropbox gives me instant access to everything. I never know when I'm going to need a file.
2. Dropbox is a folder on my laptop just like my hard drive. All my files are stored locally on my laptop but synced with the cloud. I have access to them whether or not I have an internet connection. And when I make changes, they sync automatically when I'm connected to the internet again.
3. Dropbox allows me to share folders with the people I'm collaborating with. This helps me avoid the attachment limits of e-mail servers and makes it possible for me to give (and revoke) access when necessary. When you revoke access, you can choose to remove those files from the other person's laptop with the click of a button.
4. Dropbox is an app on my iPhone. I can be talking to someone on my iPhone, pull up a Dropbox file, and send it to them...all on the same call.
5. Dropbox is an app on my iPad. No need worry about loading files before traveling or wishing you had a file at a client site.
6. Dropbox allows you to increase the amount of space based on your needs. I upgraded for a nominal annual fee to have 50 gigs of space. (Almost ready to jump to 100 gigs.) It's a back up for my back up.
7. Dropbox is simple. Drag and drop your files into your Dropbox folder...and you're done!

If you use this link to sign up, we'll both get a little extra storage space.

Are you a Dropbox fan? How has it helped you?

10

Revisiting Google Voice

I recently had a conversation with a client about [Google Voice](#). He was just as excited about it as I was when I first discovered it and began using it. I think it's really going to help him. I also remembered how many times I've shared 11 reasons why I use Google Voice. I posted it about one year ago. It's been one of the most popular posts on my blog, so I thought I'd make note of it again.

I still use Google Voice, and I'd recommend it without hesitation. If you're on the fence, I hope this post will — at the very least — encourage you to give it a try. It's not perfect, but its strengths far outweigh its shortcomings.

What's been your experience with Google Voice?

11

1Password is a time and “mind” saver

Every...single...application...has...it's...own...unique...log in...information. (I understand why but in praxis it makes me say...Urgghh!)

The problem is I can't remember any of them, and I'm smart enough to know that recording them in Google Docs is not a secure enough place to store such information. Plus, it would require that I access that file every time I needed to retrieve a password.

This is where [1Password](#) comes into play:

- 1Password saves my username and password information for future use. No more having to remember which variation I used for what account.
- 1Password grades my passwords and can generate ridiculously complicated passwords that ensure I take every step to protect myself and my account information.
- 1Password allows me to store more than just passwords. I can store financial information, social security numbers, credit card information, account details. Really, it's a home for just about anything and everything.
- 1Password makes it as easy as two clicks and a master password in order to access the information.
- 1Password allows me to save an online profile and populate the appropriate fields so I don't have to complete name, address, phone, etc. each time I make a purchase online.

- 1Password allows me to access the data on my laptop, iPhone, and iPad.
- 1Password automatically asks me if I want to save the data for future use when I subscribe to a new site or purchase from a new vendor.
- 1Password is a button on my Web browser which makes it even simpler to access when I'm online.

If you have way too much information to keep up with and are looking for one, secure location to store it all, definitely take a close look at 1Password. It's not cheap, but it's worth every penny.

How do you keep up with all your passwords?

12

Issuu.com as a content publishing platform

Issuu.com is a great tool that until recently had few alternatives. I like to think of it as the YouTube of printed content. (I still think it's the best on the market to accomplish what it was designed to do... publish online.) As more and more content is being delivered online, Issuu.com becomes an easy way to make it available to others and offers some nice benefits to the publisher.

With Issuu.com I can:

- Publish instantly.
- Track the number of views, downloads, etc. (The analytics aren't incredible, but they are insightful.).
- Embed the reader on your Web site.
- Easily share a link to content via the Web, e-mail, and social media.
- Download the content for offline consumption.
- Subscribe to the content of others.
- Bookmark other content that appears when people visit your page (Almost a recommended reading option.).
- Comment on what you see and read.

I upgraded to the Pro version for a few unique advantages. If you're looking for an online publishing platform or an easy way to display your portfolio, Issuu.com has a well-built and well-established solution. If you're looking to charge for your content, then this isn't the solution for you.

How do you use Issuu.com?

13

Mobile pros need a hotspot solution

I'm in a lot of different places and much of my work is dependent upon my access to the internet. That means if I can't access the Web, I break out in a sweat and start breathing heavily. (OK. Maybe that's a little too dramatic.) But it's irritating when you can't find a wifi access point or don't want to pay for one at every hotel and airport I find myself in. This is why having a **mobile hotspot** is essential for mobile professionals.

I use the iPhone (as I believe the whole word should...just sayin') so I was thrilled when they added the hotspot option. I immediately upgraded. For a few extra dollars per month, my iPhone becomes a hotspot that:

- Connects up to 5 devices via bluetooth, wifi, or via usb cable.
- Gives me instant access to the internet at a speed that beats most public wifi speeds. (My perception and experience, of course.)
- Allows me to avoid buying the 3G versions of devices like the iPad which saves me money.
- Doubles my data allowance from 2 to 4 gigs per month.
- Avoids the add-on cost of internet access when traveling. (Take that airports and hotels!)
- Keeps me from having to lug around one more piece of equipment.

I've been using my iPhone as a hotspot for about a month now and couldn't be happier with its ability to keep me sane (oops...I mean connected!).

14

Fax without a fax machine

Old habits die hard. People still like fax machines, particularly for things that require signatures (e.g. like contracts). So until fax machines drop off the face of the earth, I'm going to have to have some type of solution. As the tools already included in this series indicate, I'm committed to a paperless, virtual environment. Plus, I don't have a landline or office space, so a traditional fax option isn't available to me (not that I really want one anyway).

After doing a little comparison I settled on a fax service that I've been using for about 18 months: MyFax.com. There are other, more well-known names, but this one had three things I really liked:

- It had an app for my iPhone. (Always a plus!)
- I discovered rave reviews from people about the service through Google searches.
- It was very reasonably priced.

For \$10 a month I get:

- A dedicated fax number in my area code.
- A fax allowance (incoming and outgoing) to more than cover the activity level I have with the service.
- The ability to send and receive faxes via e-mail or iPhone.

Here's how it works:

- I receive paper faxes people send from a traditional, paper-based fax machine as a PDF attachment to an e-mail.
- I send faxes through e-mail that produces a paper fax for the person on the other end with the traditional, paper-based fax machine.
- I have the service set to alert me via text message when the fax I send or receive does so successfully.

I don't own a fax machine, yet I can send and receive faxes as if I did. The person on the other end never knows the difference. And I get to send and receive faxes whether I'm officing at home or traveling. Not a bad deal if you ask me.

Do you still use a traditional, paper-based fax machine with a dedicated phone line, or are you using a cloud-based fax service like MyFax.com?

15

5 things Google Reader helps me do

I use [Google Reader](#) as my RSS aggregator. RSS means "really simple syndication." It's been around for some time and a few have even questioned if it has out lived its necessity. I hope not because my RSS reader helps me:

1. Avoid having to visit every site that may contain or produce helpful, thoughtful, or strategic information.
2. Sort through more than 200 blogs in minutes.
3. Drill down quickly to see if the headline leads to equally helpful or interesting content.
4. Quickly send and share my thoughts with others via social networks and email.
5. Integrate with other tools like Instapaper and Evernote to read at a later date or for future use.

It's really easy to get started with Google Reader. And there are certainly other options, too. If you're looking for an efficient, convenient, and systematic way to sort through Web content, then RSS aggregators or readers may just be what you've been missing.

What RSS reader do you use? Has RSS been helpful to you in your work?

16

Managing projects with Things (for Mac only)

I have been using **Things** for two years as my exclusive project management tool. When I take on a new project, I look back to my first days in the publishing business and create a production calendar. I begin with the end date and then work back through every step. Last, I assign dates for each and every step.

Before Things, I would just keep these lists in file folders and check them off as I went along. But now Things has become that mission critical tool to maintain my reputation as someone who does quality work within the pre-defined time constraints of the project.

Things allows me to...

- Easily create tasks, assign dates, and attach the task to a project all on the same screen.
- Automatically mark and archive tasks as they are completed.
- Review the history of tasks and the date in which they were marked complete on each project page.
- Drag and drop files into the specific task or project page to make it easy for me to click and open the essential files needed for the task and/or project.
- Drag and drop emails from iMail and create a task. A link to the specific email is included in the notes which makes it easy to retrieve the email when the task is ready to be completed.
- Assign re-occurring schedules for tasks that I do regularly. That way I don't have to enter regular tasks over and over again.
- Quickly make notes on the same screen when I create the task or new project.
- Schedule tasks to appear in advance of the due date while maintaining the due date to give me fair warning about an upcoming assignment or project milestone.
- Re-order, reschedule, or re-assign the tasks for the day from the home screen.
- Sync my desktop with my iPhone and iPad.

Two areas where I think Things can improve...

- Sync via 3G instead of just on Wi-Fi.
- Allow the addition of tasks by emailing a specific address.

Nonetheless, Things has been a life saver and a mind saver. Once the details have been recorded, Things does its magic and ensures my clients get what they need, when they need it. It may take a little planning on the front end, but it's worth it.

Do you use Things? How has it been helpful to you? If not, what tool do you use for task or project management?



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