



Case Study: Small Business use of Technology

Now that you have a computer, you still generate documents, you still keep them in folders, folders are kept within folders, and various people have access to them. Electronic filing systems can be vastly superior to paper filing systems if we remember to follow the business practices we used in a paper environment. Do you have documents on your computer or network server that are not in folders? How many? How does that compare to the number of documents you would have tossed into a file cabinet without filing? The good news is that at least (a) *the documents are listed alphabetically wherever they are stored*, and (b) *we can always "search" for them if we remember the name, or the software application, or when they were last modified*. Hhhmmmm. There must be a better way. You're right! And it's called a *common operating environment* (COE). In a business with a network environment, where a number of employees have access to a central data depository, you:



common operating environment

- 1) ***Establish document-naming conventions***. As new documents are created, they are named in accordance with organizational policy. People looking for a document would have a good idea of the document name, even if someone else created it.
- 2) ***Determine the file structure***. Folders within folders within folders. Organizing your information so that documents are easily located.
- 3) ***Grant access as appropriate***. Security levels and edit rights, determining who can have access to what or not, when to permit "read-only" access, and who is authorized to make changes.
- 4) ***Safeguard information***. Back-up systems, on and offsite, disaster recovery plans. If you do all of the above, provide training on the implementation, you will have established a COE. The benefits are enormous and immediate.

This technology enhancement is available right now from a wide variety of companies. Use a search engine of choice (i.e., Google™, Yahoo!™, MSN™, Lycos™, Alta-Vista™, and Northern Light™) and enter *common operating environment* (COE).



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Using Databases to Work and Mine Data: Most of us couldn't imagine functioning without word processing software and spreadsheet software in our businesses. We all use e-mail and a lot of us can use presentation software, some more rudimentary than others. Yet, for some reason, the database software frequently goes unused in the small business.

Digitize, Digitize, Digitize: Maintaining our information in electronic form is critical to both the establishment of a COE and mining our data on an ongoing basis. Virtually all software applications allow for exporting data and importing data. So as long as you maintain your data electronically, you can take advantage of new software development in your industry without having to re-enter the information. Electronic files are easier to navigate and cheaper to maintain. Additional computers and memory are just less expensive than rent, file cabinets, and storage facilities.

You think about it: How far has your business moved along the learning continuum? Are you taking advantage of the latest technologies to codify the intellectual capital of your business? If you arrived at your office, and all your information OR all your money was gone, what would be more devastating to you? Now, compare how you safeguard your money with the way you safeguard your information. As you digitize your workflow, be sure you have adequate back-up systems with offsite storage for all-important information.