

CUTTING THROUGH THE CLUTTER

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Communication is the key to what we do every day, and we have to be ready to shift on the fly as our audience changes: that board of directors voting on whether to select us as their new provider; that busy executive director with whom we've worked for many years; participants seeking our counsel; or the myriad other professionals with whom we must coordinate our efforts to deliver excellent client service. We must continuously be at the top of our game.

Communication moves faster all the time. Whether you're speaking or listening, using these tools will help you move fast enough to stay ahead of the curve. And, if you're stuck in communication with someone and you want to get out, download Fake-A-Call to make sure you receive that phone call you absolutely have to answer just in time.

Adam and Yannis are always on the lookout for new and creative mobile applications and other technologies. If you have any tips or suggestions, please e-mail them at adam.pozek@dwconsultants.com and yannis@spectrumpension.com.



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01 GANTTER PROJECT, www.ganttter.com

Any specialists in supply-chain management, logistics or project management out there? If so, you've probably heard of a Gantt Chart, a type of bar chart that illustrates a project schedule.

Since many 403(b) advisors are consistently winning business en masse, Ganttter Charts can be an effective way to communicate value to individuals or management considering selecting you as their advisor. Ever been involved in coordinating a conversion of 403(b) accounts from multiple vendors into three options? Use Ganttter to map out a project plan and visually present it to your key stakeholders.

Ganttter.com is a powerful, web-based project management tool that requires no software to be installed, and it completely integrates with Google Docs. Are you a Microsoft Project user? No problem. You can import your project files into Ganttter.com and keep working.

There is no cost to use Ganttter during the remainder of its development cycle, but you better act fast. There will ultimately be a small maintenance fee once the application is fully integrated and rolled out.

02 MAILCHIMP, www.mailchimp.com

My inbox is bombarded by 25-50 newsletters per week from various sources. How do you cut through all that noise to catch the attention of your readers? Recently, I noticed a few of the ones that fully integrated with social networks (Facebook, LinkedIn, etc.) were being delivered to me via MailChimp. Don't let the name throw you off; MailChimp is easy to use and provides King Kong-sized functionality.

MailChimp not only helps you create and distribute eye-catching newsletters, but it also makes managing subscriber lists and tracking campaign performance a breeze. Throw in full integration with Google Analytics, Docs & Contacts, and you have a powerful tool that will actually tell you who opens those newsletters and cares about what you're writing!

Whether you're a small startup or a larger company, pricing is very user friendly. It's free to use for up to 2,000 emails, with up to 12,000 sends per month. For additional bandwidth, monthly plans start as low as \$10 per month.

03 BOX, www.box.net

Share, manage and access all your business content online. Box provides a secure online library for your files — documents, spreadsheets, proposals, even your favorite music and pictures. Download the free app for your PC or Mac to have Box automatically sync files from your desktop to your laptop while maintaining a secure offsite backup.

Need to collaborate with someone across town or across the country? No problem. Just add the files to a separate folder and add the e-mail addresses of your collaborators to send them a link. You can control access permissions, allow users to upload, download, edit, or read-only. Even set an expiration date on the link.

With free apps for iPhone, iPad and Android, you can access your Box files while on the go. It also integrates directly with Salesforce.com and LinkedIn.

Store up to 500 GB of data for only \$15 per user per month.

04 LINKEDFA, www.linkedfa.com

Social networks aren't new, and neither are the compliance obstacles advisors face in trying to be a part of the social media conversation. Sure, you can scan Facebook, LinkedIn and Twitter to read what's on people's minds, but how do you reach the masses with what you have to say?

LinkedFA may be your answer. It's a social media hub designed specifically for financial advisors and the communication monitoring requirements they face. Create a LinkedFA account, add the user names and passwords for your Facebook, LinkedIn and/or Twitter accounts, and presto — LinkedFA monitors all of your social media communications and e-mails you a full report every night. You can also generate on-demand tracking reports and have them sent directly to your inbox.

If you need a helping hand getting started with social networking, LinkedFA also sponsors a series of webinars just for financial advisors.

Oh, and it's free!