How to... 1

Connect

with your customers

A Microsoft Guide for Small Businesses

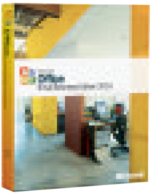
Microsoft®

How well do you know your customers?

Customer relationships are the single most important factor in business today. The way you manage and develop them can make or break your business – but now there are many ways you can use technology to do the hard work for you.

For example, do you know who your most important customers are? Think about it, it's not such a straightforward question to answer! And even if you do know, do you remember when you last spoke to them? Tools such as Microsoft® Excel and Microsoft® Outlook® 2003 with Business Contact Manager can help you create a more detailed picture of your client relationships and help you keep track of your contact with them. An obvious way of reaching your customers is to send them a letter, or email them, and this is easily done with a mail merge.

But there are other new and exciting ways of connecting with your customers. For example, with Microsoft® Windows® Messenger you can do video conferencing, share applications, initiate a Remote Assistance session, and even share a virtual whiteboard to sketch out a diagram or directions.



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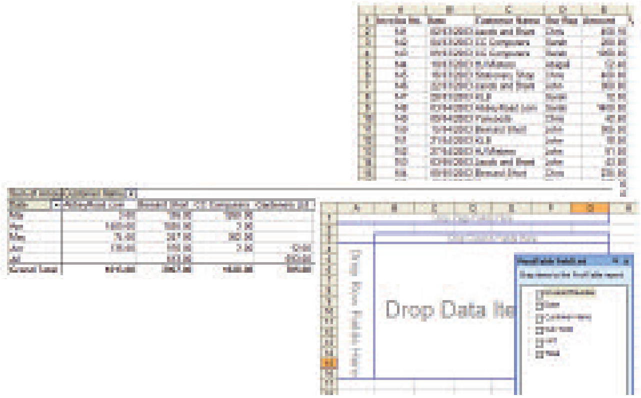
step 1

Who are your most important customers?

If you have an Excel list of invoices or customer orders then you have all the information available but it is not always easy to see a consolidated view of it. For example, who are your most important customers overall? Which is your most profitable month? Excel has some excellent list tools, and one of the most useful is being able to consolidate a list into a summary table, called a Microsoft® PivotTable®.

The table below is the PivotTable created from the Excel list shown right and we can see at a glance that March was our best month, and Bernard Short our best customer.



To create a PivotTable:

- *Click in your list.*
- *Go to the Data menu and choose* ***PivotTable*** *and* ***PivotChart Report...***
- *The wizard will begin. Step 1 asks you what sort of data you are using. Click* ***Next.*** *Step 2 asks you to confirm that it has found the right data. Check the range indicated is correct and click* ***Next.***
- *In Step 3, click* ***Finish*** *to create the PivotTable, and then drag the column headings into position to create the table you want.*

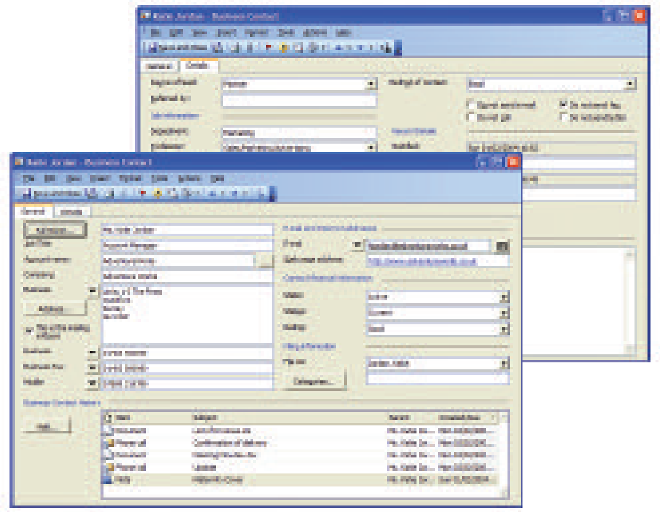
The PivotTable will have been created on a new sheet for you. Check out Excel Help for more information on working with your PivotTable.

step 2

When did you last contact your important customers?

Business Contact Manager is an add-in to Outlook 2003 to help you manage and track customer information.

This add-in gives you a new Business Tools menu in Outlook, and from there you can create an Account for each customer you do business with. If you speak to several individuals at that company all names can be entered in your Business Contacts when the Account is created.



When you open up an Account or a Business Contact, you can capture all of the important business activities to do with that person or company. Just click the **Add**... button to add an activity.

Having captured this information you can then create your reports – such as a list of neglected accounts. To do this, choose **Reports** from the **Business Tools** menu and select the required options.

Reach your

customers in a cost effective way

As the name suggests, Mail Merge allows you to merge a list of names and addresses with another document, typically a letter. Once you have created or located your list of names and addresses, simply work through the Mail Merge Wizard to complete the rest of the process.

The names and addresses can be stored just about anywhere; for example in Outlook, Microsoft® Business Contact Manager, Excel, Microsoft® Access or even a Microsoft® Word table.

- *Create the document you want to send out, leaving gaps for the address and greeting line*
- *Go to the **Tools** menu and choose **Letters and Mailings** and then **Mail Merge Wizard**...*

The Mail Merge Wizard appears at the right of the screen. There are 6 steps to work through:

Step 1:
Select the document type (usually **Letters**, but why not consider doing an email mail merge instead?) and then click on the **Next** option at the bottom of the wizard.

Step 2:
Choose **Use the current document** and click **Next**.

Step 3:
In this step you need to either navigate to the file where your names and addresses are stored, or select from your Outlook or Business Contact Manager contacts.

Step 4:
Now fill in the address and greeting line. Position your cursor at the appropriate point, and then click on the **More items...** option. Select the required item, and click Insert. Repeat for any other unique bits of your letter. Click **Next**.

Step 5:
Here you can see what your letters will look like. Follow the instructions in the Mail Merge Wizard to flick through the letters and make changes to the recipient details. When you are happy with how your letters are looking, click **Next**.

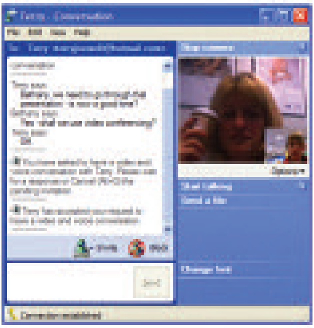
Step 6:
This is the last step of the Mail Merge Wizard, and if you chose to create emails, then they will be sent out at this stage. For paper mailings, use this step to choose to either **Print...** your letters, or to **Edit individual letters...** if you want to personalise your mailing further.

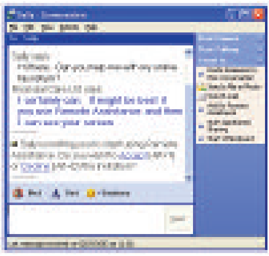
step 4

Connect with your customers in exciting ways

Windows Messenger allows you to see which of your customers or colleagues are online when you are, and to exchange instant messages with them (see right). It uses a "passport" which gives you a unique identity over the Internet. If you use MSN® Explorer or you have a Hotmail account then you already have a passport. If not, you will be able to create one, or register your email address as one, either when you download Messenger, or when you sign in for the first time. Messenger allows you to share applications or share a virtual whiteboard to draw a quick sketch!

Sometimes the best way to solve a customer's online problem is to show them how to do it. Perhaps they are having trouble placing an order on your website. **Remote Assistance** makes it possible for you to connect to their computer and help them. When connected, you will be able to view their computer screen and chat in real time about what you both see. With their permission, you can even take control of their computer and control it with your keyboard and mouse whilst explaining to them what you are doing. The easiest way to initiate a Remote Assistance session is through Microsoft Messenger.





step 5

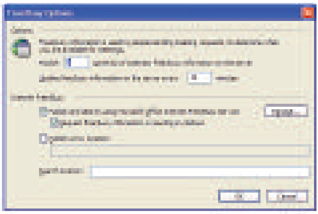
Share information

with your customers

If you are working very closely with a particular customer, think of the benefits of being able to share diary information and schedule meetings. If you use Outlook Calendar as your diary, then you can in fact share this over the Internet with whomever you choose. The feature is called the Free/Busy service, it's totally free (except for any Internet connection charges you may incur) and best of all, you can decide exactly who is allowed to access the information.

To set up your Free/Busy options in Outlook:

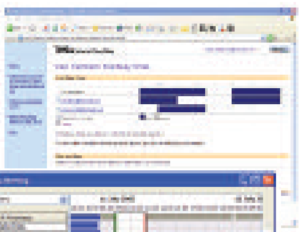
- *Go to the* **Tools** *menu, choose* ***Options…*** *and then* ***Calendar Options…***
- *Click the* ***Free/Busy Options…*** *button and the dialogue box shown right will appear*
- *Tick the option to* ***Publish and search using Microsoft® Office Internet Free/Busy Service***

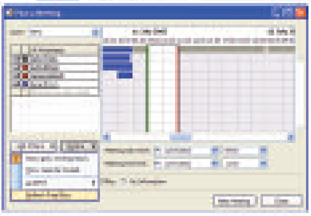


To control who will have access to your Free/Busy information, click the **Manage…** button. This will take you to the Internet Free/Busy service on the Web where you can step through the links on the left hand side of the screen.

To update your Free/Busy information, in Outlook go to the **Tools** menu, choose **Send/Receive** and then **Free/Busy Information.**

You can view Free/Busy information via a web browser on the Internet (shown right) or in Outlook's Plan a Meeting dialogue box (see below). Choose **Refresh Free/Busy** from the **Options** button at any time to update the information.





Find the help and su

Software support: There are a number of ways you can get help, advice and support from Microsoft. Microsoft® bCentral™ is a great starting point to guide you to the help and support you need and includes links to the specific areas listed below.
www.bCentral.co.uk/help/support.asp

Technology: This area provides information on how you can get more from your software investments, as well as help with specific tasks you're trying to carry out.
www.bCentral.co.uk/technology

Security: This section covers information and support on protecting your system including anti-virus options, networking systems and secure online purchasing.
www.bCentral.co.uk/technology/security

Unresolved or specific technical support queries: Microsoft has a dedicated website with centralised support resources. Here you can download software, review common issues related to your product, search the technical database (Knowledge Base), join a newsgroup and check the status of an ongoing query.
www.support.microsoft.com

Newsgroups: This page provides access to Newsgroups across a range of topics. Discuss issues with others who use Microsoft Products, including advice from Microsoft® Most Valuable Professionals (MVPs). Read interesting posts, search for specific topics, answer a question, or post your own question to any of the many groups.
www.support.microsoft.com/newsgroups

Free support calls: Retail customers may be eligible for two telephone or online support incidents at no charge. To find out if you are entitled, either telephone us on 0870 60 10 100 (8am – 6pm Mon-Fri), or submit your technical support incident online via the Microsoft UK support site to see if it is validated.

upport you need

on Microsoft UK's products and services

Links to other Microsoft resources from:
www.bCentral.co.uk/help/microsoft.asp

Microsoft has a large number of websites designed to help you get more from your software, as well as keep it up-to-date and reliable. From this page you can follow the links to:

- ***Microsoft UK home*** *– the place for everything Microsoft with information and resources on the entire Microsoft product range (including Microsoft® Windows, Microsoft® Office and Servers) as well as the latest news and community offerings.*
- ***Office update*** *– to ensure you have the latest add-ons, security features and other tools on your PC.*
- ***Windows update*** *– similar to the Office update site, the section is dedicated to Windows.*
- ***Office for Macintosh*** *– find out more about how Microsoft supports the Mac and what's available – from help to the latest products available.*
- ***Licensing Compliance*** *– be sure you're using the right software.*
- ***Technet*** *– an information and community programme for IT professionals providing valuable free resources packed with technical answers and insights.*
- ***MSN*** *– for the latest consumer news and views.*

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3. How to... Create a website
4. How to... Create brochures and flyers
5. How to... Create and mail a newsletter

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