

Organization in the Palm of Your Hand

Imagine having all of your information at your fingertips. Real Estate Agents have volumes of information to track; phone numbers, appointments, open houses, MLS listings, and the list goes on. How great would it be to be able to give someone a phone number without saying, "let me call you with that when I get back to my office," and then run the risk of another agent beating you to it. Wouldn't it be so much easier to always have your current schedule in front of you so you are able to schedule an appointment immediately, thus eliminating the need to update a master calendar when you are back at the office? Would you like to be able to read your email between appointments and respond to them if you have a break in your schedule? You can do all of this and more with a Personal Digital Assistant or PDA.

PDAs are becoming as common as cell phones; in fact some PDAs even have a phone built into them. Owning one of these handy devices and using it are two different things. If you already own a PDA, you may want to try a few of these simple organizational tips and tricks.

If you do not own a PDA – before you purchase one, be aware that PDAs run on one of two operating systems: the Palm O/S or Windows. The models that run on the Palm O/S will synchronize with either the Palm Software, or Microsoft Outlook. The models that run on Windows will also synchronize with Outlook, displaying your data almost identically using similar naming conventions as Outlook. It really becomes a choice of personal preference and how you would like to see your data displayed on the screen. Once you make this decision, you will have cut your options in half. From here, you will need to decide which features you need, and which features would be "nice to have." Prices range from \$99 to \$750 – the more features you want, the higher the cost.

Features to consider: Does my PDA need to be wireless ready so I can access my email and the Internet when I'm out of the office? Do I want the PDA to double as a cell phone so I only have one device to carry around? Would it be helpful to have a digital camera on the PDA to take pictures of houses you are listing? Would a built in MP3 player or book reader be helpful for long trips? How about a voice recorder, so you could record notes as you think of them when you can't write them down? These are just a few of the features you will find.

Think about how you will use your PDA. Will you use it only for scheduling and retrieving addresses and phone numbers? If the answer is yes, you probably don't need to spend a small fortune on excessive features. One question most frequently asked before making the investment is "Do I need wireless capabilities?" Some PDAs today come with Blue Tooth technology – the technology that allows your device to connect to the Internet (provided you purchase a monthly service plan for about \$40-\$50/month). Having wireless access to the Internet and email is wonderful, but make sure that you

aren't setting yourself up for even more work. Most people already have an office and a cell phone, each having voicemail that needs to be checked regularly, not to mention all of the calls to return. By giving yourself instantaneous access to the Internet, although a convenience, are you setting yourself up to respond to email messages, as quickly as returning a phone call.

To use your PDA as efficiently and effectively as possible – try these simple tricks:

1. Use Categories – Create your own custom list of categories in Outlook. Using categories allows you to pull up a section of your database or group of tasks, so you don't waste time scrolling through endless information.
2. Create Custom Fields – Using the "Design a Form" feature in Outlook. You can add custom fields to your contact screen, enabling you to track additional information such as sold date, or whether your client was the buyer or seller. The beauty of this is that any fields added to your contact screen will automatically transfer over to your PDA.
3. Use the "Status" or "Show Time As" field on calendar items to select if you are "Busy", "Out of the Office" or have a "Tentative" appointment. This will color each appointment; for example, if you are "Out of the Office" those appointments will be displayed with a purple designation. This makes it easy to look at your calendar "at-a-glance" and determine where there are openings in your schedule.
4. Use the "Task" component to track things you need to remember to do – whether they are for you or a client. Writing these things down frees up space in your memory and allows you to refer back as needed. For example, you may want to have a category called "Client Projects" where you store "to-do" items for these clients so you don't forget what needs to be done.
5. Use the "Notes" section to jot down bits of information that aren't necessarily part of a contact or a task item – for example, maybe you need to remember what type of toner you use for your printer – this would be a great piece of information to store in a note, that way when you are shopping you will know exactly which cartridge to buy.

There are so many great reasons to own a PDA; they really can help to simplify your personal and work life. Is a PDA right for you?

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