



SOCIETY OF ACTUARIES

Article from:

Independent Consultant

March 2009 – Issue 24

[Print-Friendly Article](#)[Search Back Issues](#)

Contents

- ➔ [Project Management: Sticky Situations](#)
- ➔ [EAS Show 'n Tell!](#)
- ➔ [The Art of Communication: Eight Steps to Getting It Right](#)
- ➔ [From The Editor: More Tools For The Executive On The Go](#)

Preferred Vendors Services Expanding!

If you haven't checked the Entrepreneurial Actuaries' (EA) Preferred Vendors site lately, now would be a great time to do so! Several new vendors have been added over the last month or so. These vendors can serve the interest of small business people and entrepreneurs. Some offer discounts to EA section members. To view a listing of vendors with a brief description of the services they offer, [click here](#).

Entrepreneurial Actuaries Section

*Officers:
David Axene, Chairperson
Sandor Goldstein,*

From The Editor: More Tools For The Executive On The Go*by Bill Ely*

The article in our last issue regarding office and professional tools generated a lot of positive feedback. Several of you asked for more information, specifically related to keeping you productive while on the road.

I remember years ago, being frustrated that I had to carry a cell phone, a Palm Pilot, and my laptop when I traveled. Plus, I had a GPS navigation unit in my car. I remember saying that someone, somehow, some day would figure out how to combine all these into a single device I could carry with me to meetings, on customer calls, or even out to my backyard if I want to work there.

Well, that time has arrived. Many executives travel on client calls now with only a single mobile device in their coat pocket—everything else is left behind (or no longer exists). Note: these tools generally do not replace your desktop or even your laptop; look at them as extending the reach of your physical office wherever you go.

1. **Forward it.** Forward your office phone to your mobile phone. The quality of phones and signal strengths has dramatically increased in recent years. If you keep a professional voice mail message active on your mobile, your clients don't need to know you are taking their call from the beach. On a related note, several entrepreneurs (and homeowners) are totally foregoing a landline phone, opting to use only their cell phones. If you carefully select a carrier and plan (with plenty of minutes), many people find they save money by discontinuing their landline service.

2. **Sync up!** Sync your mobile phone to your office calendar and contacts so your most current information is always with you. This is not the same as finding a phone with a spot to enter your contacts and appointments—who wants to maintain this information in two places?! I like to maintain my primary calendar and contacts in MS Outlook on my desktop in my office and then sync that information with an application on my cell phone. Different phone and different carriers offer a variety of options to sync this information—either with a physical connection (docking station, USB cable, etc.) or wirelessly from any location getting a phone signal. This wireless option is especially valuable when someone else (like an administrative assistant) updates your calendar and needs to get the information to you and your device.

*Vice-Chairperson
Emil Burns Kraft,
Secretary/Treasurer*

*Council Members:
Kevin Dolsky
William R. Ely
Michael L. Frank
James Ramenda
Larry N. Stern
Frederick S. Townsend*

Visit our [Web page](#) for more information, or view past articles at our [Resource Center](#).

And review special offers for our members at our [Member Benefits page](#), from vendors recommended by other EA Section members.

William Ely, Editor
ph: 816.903.2001
billely@wrely.com

SOA Staff:
Meg Weber, Staff Partner
ph: 847.706.9585
mweber@soa.org

Jacque Kirkwood, Staff Editor
ph: 847.706.3572
jkirkwood@soa.org

Sue Martz, Section Specialist
ph: 847.706.3558
smartz@soa.org

3. Use Google. Similarly to syncing your phone with your office calendar, Google Calendar keeps your calendar on their Web site. You can allow others to view your calendar, perform some sophisticated searches (it's Google, remember!), and even set up automatic reminders, including mobile phone notifications. I know people who swear by all the Google applications.

4. Cell phone e-mail. More and more people are sending and receiving e-mail from their cell phone. Have you sat in a meeting lately where people are continually reading and responding to messages during the meeting? The jury is still out whether this is disruptive or productive. One note: if you plan to use your phone for e-mail, strongly consider a QWERTY keyboard. Most people get used to the small keys and strongly prefer it to the alternative where a single key represents three letters and you need to tap it multiple times to get right letter.

5. Built-in GPS navigation. Several wireless carriers (including Sprint and Verizon Wireless) offer a service which places an application on your mobile phone that approximates a separate GPS unit. I found the Verizon service to be easy to use and it includes the locations I need to find. I also like the fact that I can choose from a monthly subscription or just pay on an as-needed basis.

6. Internet access. Of course, many mobile devices now offer Internet access. Using your favorite browser, like Internet Explorer or Firefox, you can access almost any Internet site. Some sites accommodate for viewers on smaller mobile devices with screens redesigned to minimize use of the side or bottom scroll bar—which can be incredibly annoying when viewing a regular Web site on such a small screen.

7. MS Mobile Office. Preloaded onto certain cell phones, Microsoft's Mobile Office offers versions of MS Word, Excel, Outlook and PowerPoint. These familiar programs allow you to view and even sometimes edit documents on your mobile device. I typically don't use them to create new documents—the functionality is limited and can be a bit cumbersome with the smaller view—but this functionality has freed me from my laptop on many occasions. If you plan to use these programs, strongly consider purchasing a memory card to store your documents as most cell phones do not contain sufficient memory to store documents.

8. Palm applications. If you have a Palm phone, you can download literally thousands of programs. These programs are developed by Palm, as well as a host of other software vendors and even computer hackers who want to share the apps they have developed. Some applications are freeware and others are priced very reasonably. The [Palm Store](#) itself offers no fewer than 362 titles in the Professional category alone—applications ranging from Pocket Quicken to lots of calculators to mileage trackers.

Many of us have PDAs, smartphones, Blackberries, etc. that we carry with us. But, are you truly leveraging all the capabilities these devices have to offer? E-mail us at billely@wrely.com to tell us your favorite aid to help untether yourself from your office.



Bill Ely is director, Actuarial Services at Coventry Health Plan of NE & IA. Prior to joining Coventry in 2009, Bill spent 10 years as the owner / president of the actuarial consulting firm W.R. Ely and Associates, LLC.

[\[return to top \]](#)

475 North Martingale Road, Suite 600 • Schaumburg, Illinois 60173
Phone: 847-706-3500 • Fax: 847-706-3599 • www.soa.org

Actuaries
Risk is Opportunity.™