

## Meetings, and e-mails and no time to work on my stuff – oh my!

Lions and tigers and bears, in today's world of managing projects equates to meetings, and e-mails and no time to work on my stuff – oh my! The #1 challenge of managing multiple projects is keeping track of all the details. If you find yourself juggling different priority lists, sticky notes, reminders on your phone, notes in your bound notebook, and multiple to-do lists – you're not alone.

How do you gain the courage, the intelligence and the heart to decrease the stress and take control? Better organization, by taking advantage of technology, is the answer.

The product I'm recommending, based on leading marketing, marketing research and new product development projects for 25+ years, is an Excel based tool entitled CRM Excel Template. While Customer Relationship Management (CRM) is all the rage, this tool is equally powerful for project and portfolio management.



Category	Priority	Status	Project	Contact Name	E-mail	Last Contact Date	Follow Up Date	Comments / Next Steps / Action Items
Ad Agency	1	AR	Project A	Demo Person #1	dperson1@comcast.com	3/5/12	3/6/12	Initial phone call to discuss project work. Asked to follow up tomorrow to talk a bit further.
Branding	1	IM	Project C	Demo Person #3	dperson3@domain.com	3/4/12	3/11/12	Project routing gate 1 to 2. Team members should approve on line within the next week.
Photographers	1	AR	Project D	Demo Person #4	dperson4@us.company.com	2/27/12	3/4/12	Gate 3 to 4 routing this week. - Specifications complete. - Plant has signed off. - Financials approved. - Production quantities loaded.
PR	2	FU	Project B	Demo Person #1	dperson1@comcast.com	3/5/12	3/5/12	This is an example of the type of note that can be created. Action items from the meeting can appear as such by utilizing a "hard return" - A/1 (Jon) follow up with Kathy on the product specs - A/1 (Sue) to have the artwork files ready by next Tuesday
Branding	3	AI	Project C	Demo Person #2	dperson2@verizon.net	3/4/12	3/19/12	Asked to follow up in 2 weeks time to discuss how we might be able to work together. Looking for a firm with our type of experience.

*Dashboard Page*

CRM Excel Template is easy and simple to use with three major components: a Dashboard page, a Settings page and Individual client/project sheets. The **Dashboard** page provides a top line summary of the projects and clients being managed; 2) the **Settings** page enables easy customization of the tool to fit specific business needs and terminology including – priority and status codes, categories of business type, strategic evaluation criteria as well as the length of time for reminders tied to follow up dates; 3) **Individual client/project sheets** retain contact information (name, address, telephone numbers, e-mail ...) and a complete detailed record of historical meeting notes.

Export and import features allow project files to be shared between team members. To learn more about the product, visit [www.crmexceltemplate.com](http://www.crmexceltemplate.com) where there is the option to download a free 14 day trial.

With a structured way of managing projects you'll be able to more confidentially ask, like the Guardian of the Emerald City Gates, "now state your business".