



Put Technology to Work for You and Get More Business with Less Effort

Session: 135



NATIONAL NOTARY ASSOCIATION

Introduction & Background

JULIE BRICKLEY

- Owner, Signed-N-Sealed, LLC
Colorado Springs, Colorado
- Notary Public (2011), Signing Agent (2012)
- Fourth NNA Conference : 1st – Austin 2013
- US Navy Veteran (1981-1989)
- Self-Proclaimed gadget/technology junkie.
- Married to my sweetheart for 26 years
2 grown children that we homeschooled
on a goat farm for 17 years.



Overview/ Objectives

WHAT YOU NEED TO KNOW

- **I can't cover everything in 1 hour**
There are about 7 different Topics.
I only have time to go into 3
- **Request Notes and PDF**
Session Notes on NNA2016 App
SignedNSealed.com/NNA2016
Leave business card in bowl at the back



Overview/ Objectives

WHAT WE WILL COVER

- **Setting up your Mobile Office**

Choosing the Right Equipment,
Computers, Scanners, and Printers ... Oh My!

Installing an Inverter and Connecting Equipment

- **Automate and Generate more Business**

- **Be Smart with your Smart Phone / Tablet**

Shortcuts , Apps, Invoicing and Payments, Security



Becoming a MOBILE Notary

REWARDING & EASY

- **Self-Employed**

Set your own hours and fees

- **Easy Start-Up**

Become a Notary
Own a car and printer

- **Supply & Demand**

Lots of demand for mobile notary service,
small supply of notaries who provide it



Working as a MOBILE Notary

CHALLENGING

- **No access to computer or files**

-you're MOBILE and ALWAYS in your car

- **Can't create job order or invoice**

-you're MOBILE and ALWAYS in your car

- **Can't scan or fax documents**

-you're MOBILE and ALWAYS in your car

- **No time to build your business**

-you're MOBILE and ALWAYS in your car



Succeeding as a MOBILE Notary

- What is the **#1 Challenge** to being a successful Mobile Notary?

You're MOBILE and ALWAYS in your car!



Overview/ Objectives



Introduce tools, tricks, and tips that help you become the go-to notary, while you're on-the-go.

- Time is Money – Less admin work means more time for \$\$\$ making
- Improve communication and workflow between Notary & Customer
- Automate your business and Do more work in less time,
- Setting up your Mobile Office
- Implement secure information handling on Smart devices



Your Mobile Office

WHAT YOU WILL WANT

All this new business means more time in your car, and less time at your office.

- | | |
|--|--|
| ▪ Desk / Workspace | ▪ Printer
Inkjet and/or Laser |
| ▪ Inverter
Convert cars DC power to AC power | ▪ Portable Scanner
Good for faxing/emailing multiple documents |
| ▪ Laptop/Tablet
Work and talk at same time | ▪ Shredder |
| ▪ Mobile WiFi
Secure. Never use open Wi-Fi | |



Your Mobile Office

ORGANIZED WORKSPACE

- Laptop/Tablet w/chargers
- Files (extra forms, labels)
- Writing Surface and Paper
- Basic Office Supplies



Don't try to do this while you are driving.
Your life is worth more than your business.



AutoExec CarDesk
w/400 Watt-Inverter
(\$150-\$250)



Your Mobile Office

INVERTER

Converts 12v DC power to 110v AC power.
Needed to run any electric equipment in your vehicle.



Things to Consider

- What do you want to run?
- How often will you use it?
- How much do you want to spend?
- Will there be a return on your investment?

Size and Type

- Sizes Range : 300 – 4000 watts
- Price Range : \$30 - \$400
- Installation : Plug-In/Installed



Your Mobile Office



PLUG-IN INVERTER

- 400 Volts or Less : Plug in to cigarette lighter
- Small Items: Laptop, Inkjet Printer
- Prices Range: \$30 - \$75



INSTALLED INVERTER

- 1000+ Volts : Professional Install
- Things that need Heat: Laser Printer, Shredder, Coffee Pot
- Price Range: \$150 - \$400



MARINE CELL BATTERY

- Spare battery runs equipment w/o draining your main battery
- Price : \$60 - \$150



Your Mobile Office

EXTRA LAPTOP / TABLET

- **Laptop**
Just like office only smaller Netbook 11"
- **Tablet**
Apple or Android. Limited capability.
Cell phone on steroids
- **2-in-1 Laptops**
Detachable Screen
Best of both worlds
Come in 8" and Larger



Your Mobile Office

MOBILE Wi-Fi

- **Smart Phone**
Use the HotSpot to connect
Limitations: Disconnect if phone rings
No Extra cost if you already own it
- **Mobile Wi-Fi**
Small, Portable, Convenient
Connect up to 10 devices
Cost Effective (\$75-\$120 plus limited fee on service)
- **Tablet**
Need a Dedicated Data Plan
Work on it while you talk
HotSpot Connect other devices



Your Mobile Office

MOBILE PRINTERS.

So Many Options

- Small Size : 10.1"H x 14.6"W x 15.1"D
- Multi Purpose Tray 50pg (Legal)
- Built-in ADF Scan to Cloud/Phone
- Wireless printing from phone



Things to Consider

- Power Usage (500 – 800 watts)
- Price Range : \$100 - 300
- Speed (20-40 ppm)

IMPORTANT!!!
Learn to Read a SpecSheet



Your Mobile Office

PORTABLE SCANNERS



SMARTPHONE

Scanning Apps : CamScanner, FaxScanner
Easy to use. Scan multiple pages.
Many interface with email and other installed apps
Sacrifice quality, and take more time



PORTABLE SCANNERS

Small and Very Portable
Scan multiple pages quickly. Great quality.
Scan straight to the cloud or to your phone



Be Smart with your Smart Phone

SMART DEVICE

- **Phones** (lifeline to your business)
- **Tablets** (Android & iPads)
- **Don't have one? Get one**



Remember our #1 Challenge... You're Mobile.
You must have access to your "office".

Better – Get Two : One to talk on, One to work on
Android, iPhone, Windows : Work different, Similar capabilities



Be Smart with your Smart Phone

SMART PHONES (lifeline to your business)

- **Data Plan**
Don't skimp here. Minimum 4-6 GB.
- **Invest in a good one**
Make sure to update software regularly
- **Add Bluetooth headset**
Talk and use it at same time
- **Add SD card**
Lots of memory. It will operate faster



Be Smart with your Smart Phone

TABLETS (Android & iPads)

- **Grown Up Phone**

Work with downloaded apps
Not all apps on phone are available on tablet

- **Not all have Dedicated Data Plan**

You will need portable WiFi
Data plan. (\$10-\$40/mo)

- **Larger work space**

Great for "mature" eyesight
Can be used while you're on phone



- **Limitation**

Does not replace or work like
your desktop computer



Be Smart with your Smart Phone

APPLICATIONS ("Apps")

- **What Exactly is an "App"?**

A mobile interface for a computer or cloud based
application

- **Many Come Pre-Installed on Device**

See and Play with what you have

- **What to Look For in an App**

Compatible and syncs with what you already use

- **Buy Paid/Pro Version**

Get rid of the ads...they eat battery life and data



Be Smart with Your Smartphone

MUST HAVE APPS

- **Email**

Use a cloud-based calendar that is attached
to your email. (Outlook, Google, Yahoo)

- **Calendar**

Again, use platform that syncs across devices

- **Maps, Weather, Road Conditions**

Know HOW to get there and IF you can get there.

- **Printer Interface**

Use to print to from your phone (i.e. PrinterShare.)



Be Smart with Your Smartphone

MUST HAVE APPS

- **Electric File Shredder**
You will need one to keep your phone secure and erase scanned and downloaded NPPI
- **Credit Card Processing**
Especially if you want to be able to generate more business in general Notary work (GNW), i.e. Square, Stripe, Authorize.net

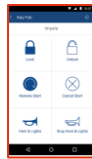


Be Smart with your Smart Phone

RECOMMENDED APPS

- **Mileage Tracker**
Many apps that automatically activate and track without your input
- **UPS & FedEx apps**
- **Invoice & Accounting**
- **Electronic Notary Journal**

- **On Star**



Be Smart with Your Smartphone

RECOMMENDED APPS

- **Electronic Notary Journal**
If your state allows, this can be a saver and money maker. Your journal is always with you
NotaryAct and **iNotary** are the two most popular Cloud Based and Secure
Configure by State Requirement
Work from computer, phone, tablet
Sync across all platforms



Being Smart with Your Smartphone

ORGANIZE YOUR APPS

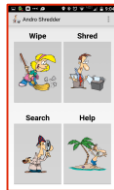
- **Sort Alphabetically**
Do this in your phone setting
Save you time looking for pictures
- **Use HomeScreen**
Everything is where you need it,
when you need it.
- **Building folders for apps**
Signing Services, GNW, Notary
Contacts, etc



Being Smart with Your Smartphone

SMARTPHONE SECURITY

- **Secure Access to Your Device**
Pin Code and/or Thumbprint
- **Install Electronic File Shredder**
Deleting file from application does not delete
it from your mobile device.
Check your Download folder on SD Card
- **Remote Wipe Your Device if Lost/Stolen**



Automate Your Business

BASIC RULES OF BUSINESS

- **Time is Money**
You either making money or losing/missing
opportunities to make money with your time.
- **Only do things Once**
Not at all if possible
- **Only do the things that Only YOU can do**
If someone or something can do it for you... Let them.
- **Automate Repetitive Tasks**
Programs and Systems that work for you



Automate your Business

ONLY DO THINGS ONCE

- **Data Entry**
The more you touch it, the more opportunities you have to mess it up.
- **Group Email(s)**
Create Tags or Groups for your contacts
Use to send bulk and canned emails. "My commission has been renewed."
Notary Signing Agent Specific: Notary Assist, Notary Gadget, Closing Commander.
General Business: Zoho, PipeDrive, Salesforce, Ac
- **Google Docs and MS Excel/Word**
Least expensive – Learn to make spread sheets and use mail merge



Automate your Business

ONLY DO WHAT ONLY YOU CAN DO

- **If Something Else Can Do It...Let It**
Online Scheduling: Let your customers do their own data entry
AccuityScheduling, YouCanBook.me, Square, JotForm (\$10-\$40/month)
Email Marketing/Campaigns: Auto-generate e-mail to a group or individual. Reminders, Ask for Review, Follow-Up, Newsletters.
Mail Chimp, Constant Contact, Active Campaign (\$10-\$40/month)
- **If Someone Else Can Do It...Let Them**
FedEx and UPS will come pick up packages. Schedule online
Answering Service can answer calls /schedule while you're busy
Other Notaries can do jobs for you



Automate your Business

REPETITIVE TASKS: Automate or use Shortcuts

- **Emails**
Canned Responses: Both Gmail and MS Outlook have the capability
i.e. "Customer contacted and appointment confirmed."
- **Scheduling and Invoices** (\$10-\$40/month)
Search for programs that do things all from one place.
Many integrate the whole process : Scheduling, Invoicing & Email



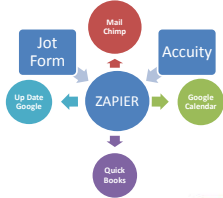
Automate your Business

REPETITIVE/AUTOMATED TASKS

- **Zapier and IFTTT**

Make applications talk to each other
Zapier connects with more than 300 applications online

Tell applications to do something else.
Example: Add Appoint to Calendar,
Creates Invoice in FreshBooks



Thank You

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- **Fill Out your Review Form**

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