Put Technology to Work for You and Get More Business with Less Effort
Session: 135

Introduction & Background

JULIE BRICKLEY
- Owner, Signed-N-Sealed, LLC
  Colorado Springs, Colorado
- Fourth NNA Conference: 1st – Austin 2013
- 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

- 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

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

Your Mobile Office

WHAT YOU WILL WANT

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

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

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

PLUG-IN INVERTER
- 400 Volts or Less: Plug in to cigarette lighter
- Small Items: Laptop, Inkjet Printer
- Price 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

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**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

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**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: CamScan, FaxScan
  - Easy to use. Scan multiple pages.
  - Many interfaces 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

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

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

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 NPP.

- 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

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

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 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 spreadsheets 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.
    MailChimp, 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

REPEETITIVE TASKS: Automate or use Shortcuts

- **Emails**
  - Canned Responses: Both Gmail and MS Outlook have the capability.
    “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

- Request Notes and PDFs
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- Fill Out your Review Form

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and
Get More Business with Less Effort
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