

June 2016 | Featured Article

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Apps That Make My Life Easier

Have you ever stumbled upon a system or app that you cannot believe you ever lived without? Stumbling on these gems is a favorite pastime of mine. Maybe I was sitting at lunch with a friend and they mentioned some obscure piece of software in passing. Sometimes I am just cross-eyed working on a project and needed a break, so I started surfing the trending apps in the Apple Store.

Whatever the case, I have a handful of these systems in my arsenal that I deploy company-wide at Genesys or simply use personally to help me be more efficient. If you know me by now, I am a fan of Top 10 lists so I am going to briefly run down the top 10 apps that truly bring value and efficiency to my life or the lives of those around me.

10. HoursKeeper

At Genesys, we have many clients that use us throughout the year. Whether we are managing the installation and launch of a new system or if they pull us in to review “one off” technology contracts to make sure everything is consistent with their corporate policies. [HoursKeeper](#) installs on our iPhones and gives detailed hourly tracking reports by customer each month. There is a free version and a paid version. Very intuitive and very flexible. It is a must have in our organization.

Compatibility: iOS and Android



9. LucidChart

Whether it is designing a flow-chart, mapping a process or building out a systems map for our clients, [LucidChart](#) is an amazing cloud based system that is easy to use and less cumbersome than Microsoft Visio. I like that I do not have to install any software and my documents are accessible from anywhere. If you are a visual person like me, check out [LucidChart](#).

Compatibility: Mac, PC, iOS and Android



8. MindMeister

For years I was a huge fan of MindJet’s MindManager. Then they got ridiculous with their licensing and I had to find something else. [MindMeister](#) is a great way to get complex brainstorming sessions on paper fast. It is a cloud-based mind mapping utility that is simple to use and it will go as fast as you can hit the Tab and Enter keys. Many of the presentations we do at Genesys are built in [MindMeister](#) and it really helps to show the complexity of any given decision.



[Back to Newsletter](#)

Newsletter Archive

- [Dec 2015 - Volume 1 | Issue 1](#)
- [Jan 2015 - Voume 1 | Issue 2](#)
- [Feb 2016 - Volume 1 | Issue 3](#)
- [Mar 2016 - Volume 1 | Issue 4](#)
- [Apr 2016 - Volume 1 | Issue 5](#)
- [May 2016 - Volume 1 | Issue 6](#)

QuickLinks

- [About Genesys](#)
- [Genesys Services](#)
- [Newsletter Sign Up](#)
- [Tech Revelations Home Page](#)
- [Contact Us](#)

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- [Managed Services Evals](#)
- [Card Brand Flip Analysis](#)
- [Conversion Management](#)
- [Forward Facing Systems](#)

Ministry Spotlight

- [Groundwire](#)

Compatibility: Mac, PC, iOS and Android

7. DialPad

I fought having a VOIP (Voice Over IP) system for years. After we grew to a certain level I finally pulled the trigger on [DialPad](#). I have to say that I wish I would have done this years earlier. [DialPad](#) is cloud-based VOIP system that enables us to have an automated attendant, voicemail to text (IM or Email sent with the transcript of a voicemail), Instant Messenger, Video Chat, Departmental routing for inbound calls and integration to Google Apps. Simply plug in your wireless USB headset into your Mac (or PC) and use the SoftPhone on the screen. No need for a desk phone! Once you take the time to integrate [DialPad](#) with my address books and Google Chrome browser the efficiency of the system comes to life. Now, any phone number on my screen becomes a link and I click and call. So stinking cool. I can even see when others in the company are on the phone. I can even transfer the call from my Mac to my iPhone with a click of a button so no more needing to drop off conference calls to hop in the car and dial back in.



Compatibility: Mac, PC, iOS and Android

6. UberConference

This one is awesome! [UberConference](#) is owned by DialPad or vice versa...I cannot keep up, but it is a cloud-based conference call service with an online user interface. [UberConference](#) offers PINLESS teleconferencing and screen-sharing. It integrates with Salesforce, Evernote and Google Calendar. What this means is your conference calls are logged in Salesforce, your meeting details are sent to Evernote and you can add your teleconference and web-conference information into your meeting invite with the click of a button. While you are on the call you can see who is on the call, record calls and kick people out (nice feature when someone makes you mad). You choose an 800 number(s) or local number(s) for your entire team. [UberConference](#) is very reasonably priced and really brings a lot of convenient features to the table to make your day so much easier.



Compatibility: Mac, PC, iOS and Android

5. Evernote

If you are not familiar with [Evernote](#), get familiar with it. [Evernote](#) is a cloud-based catch all for everything you do on your computer, phone or tablet. Every call I am on I create a new note and take notes (it syncs with Salesforce) in [Evernote](#). You can share notes with coworkers, scan business cards with your phone camera(which creates a contact card - vCard), take pictures of events, clip web pages, send an article for reading later or hammer out any thought you have. It all syncs to the cloud and in turn syncs your phone and desktop client. [Evernote](#) is easily searchable for keywords or tags that you create. I do not even bother organizing it any more...the search functionality is that good. If you don't use it...you should.



Compatibility: Mac, PC, iOS and Android

4. Google Apps

I spent a ton of time reviewing [Google Apps](#) for Work two months ago. You can read that article here. [Google Apps](#) is an amazing resource for Genesys. It provides a completely collaborative work environment for almost nothing each month. Corporate email is only the tip of the iceberg. It offers a completely collaborative suite of network storage, word processing, spreadsheets, custom web sites, instant messenger and presentations. Seriously, it just works and it makes all of that easy to manage and you do not have to worry about it going down.



Compatibility: Mac, PC, iOS and Android

3. Slack

[Slack](#) is a cloud-based instant messenger that has transformed the way we communicate at Genesys. The day I found [Slack](#) I think everyone in the company rolled their eyes and thought to themselves - "Here comes Saylor with another app for everyone to use..." I think everyone will agree that [Slack](#) is the best communication device we use in the office. First and foremost, it drastically reduces internal emails. I am on a mission to limit the amount of emails I get each day and Slack is on the front line of this initiative. You might be saying to yourself..."Can't you use iMessage or Google Apps?". Good questions and um...NO. We all use iPhones at Genesys but iMessage gets clouded up with your personal stuff and we are all constantly sending people the wrong messages...which can be embarrassing. Google Apps does not allow you to attach documents to your IMs so that is a deal killer. [Slack](#) allows you to create "Channels" that are defined by group members or topic. Those channels are always in your side-bar and so easy to find and create a quick message. It saves so much time and is completely free. Add in the ability to attach videos, pics and any document or file, it saves so much time and more importantly saves your inbox from clutter.



Compatibility: Mac, PC, iOS and Android

2. Salesforce.com

[Salesforce](#) has really become my go to system on a daily basis. We have had it for years but honestly, CRM systems are painful to use. Enter the Lightning interface. [Salesforce](#) recently put a new face on a very old and tired looking system. It has opened up a world of data management that I have been doing manually for years. It integrates with our Google Apps and logs emails, calendar events and documents. Furthermore, Evernote, Smartsheet (see below), UberConference and DialPad all offer plug-ins to seamlessly log what you are doing in each account or contact. Our world is just opening up to the possibilities afforded by [Salesforce](#) and more banks are choosing Salesforce as their CRM system. With the [Salesforce](#) appexchange the possibilities are limitless. It is not cheap though and Salesforce just hiked the price up on us...that was a hard pill to swallow but it is worth it.



Compatibility: Mac, PC, iOS and Android

1. SmartSheet

Where do I begin with this one. [SmartSheet](#) is #1 because it is hands down the easiest cloud-based project management software out there. It looks like an excel spreadsheet but the automation and collaboration is so genius. We use SmartSheet to track projects and all the documentation that goes along with that. I use [SmartSheet](#) to keep track of my professional and personal task lists. I also use it in my church to communicate with the parents of the 25 seventh graders that I am leading through middle-school. There are too many features for me to run through but I would encourage you to take a look. Take special note of the uploads feature and the ability to send any row to anyone for an update. They just fill out the form (that builds automatically) in their email and it updates your sheet. They can also make comments and upload files. You can automate updates and reminders that go straight to email. It is a life changer and I am so thankful for the people at [SmartSheet](#) who make all of this possible.



Compatibility: Mac, PC, iOS and Android

Runner Ups - Honorable Mention

Ok, ok - I need to mention two more...

Spotify

I love [Spotify](#). My kids and family love Spotify and Alexa (Amazon Echo - see below) loves Spotify. I had to mention it because I will never buy another song ever again. [Spotify](#) has all the music I need and I can download my favorites and playlists to my phone for offline listening. I am sure you have heard of it but I just had to mention it. For \$14.99 a month for my whole family...you cannot beat it.



Compatibility: Mac, PC, iOS and Android

Amazon Echo

[Alexa](#) has become part of the Saylor family. From giving us a weather report as we walk across the room to being the DJ during our family dinners each night. It is truly amazing what Amazon has packed into the Echo. The possibilities are endless. My wife (Denise) and I were walking upstairs to go to bed the other night and Denise said “[Alexa](#) turn off the lights.” All the lights went off and Alexa responded, “Ok, goodnight”. So cool. I never thought I would purchase an Echo. However, I was sitting in a vendor conference recently and the presenter brought Alexa out on stage. The presenter said, “Alexa, transfer \$500 from my account to my daughters (insert daughters name) account with Online Banking (insert vendor specific term).” [Alexa](#) responds, “Ok.”. The presenter then went into their mobile banking app and showed the transfer being completed. I was sold. I sat there and ordered an Echo on the spot. Google and Apple are scrambling to duplicate the Echo and this technology will be deeply ingrained in the years to come. Ask your core vendor if they are working on this. You do not want to be last to this party. So I stand corrected, now I am contemplating buying another Echo for Master Bathroom so she can run down the weather, play music, review my schedule and send text messages for me while I get ready in the morning or get ready for bed in the evening. I have not even scraped the surface of what the Echo can do and I would encourage you to check it out.

You may be asking yourself why we decided to write an article that was almost unrelated to banking. Well, first we are passionate about using technology more efficiently and second we are not all bankers 24 hours a day. I enjoy hearing about new apps or systems so feel free to post on the [Beacon](#) if you have an app that I did not mention that you cannot live without or email me directly. See you next month in [Tech Revelations](#).

