EVERNOTE @WORK

The Ultimate Guide to Implementing Evernote In Your Business

Joshua Zerkel, CPO®

Evernote at Work
The Ultimate Guide to Implementing Evernote in Your Business

Second Edition

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Part 1

Getting Down to Business

What is Evernote, Anyway?

Once in a while, we're introduced to a tool that has uses far, far beyond what its inventors had originally created it for. For instance, fire can be used to cook, to heat, as decoration, and to power transportation. Evernote, while probably not quite as important to us as fire, is similar in that it wasn't originally intended to become the far-reaching productivity tool it is today - rather, it began somewhat humbly as a relatively simple note-taking application. From those simple beginnings, Evernote has become a very powerful and useful productivity tool that can help you centralize and manage many important aspects of your business and your life.

Evernote is many things to many people, but the simplest way to describe it is that it is a very easy to use, yet powerful database that lets you capture, organize, and share virtually any type of information. Each bit of information you capture is called a note, and notes live within notebooks to help them stay organized.

Sounds complex? It's not - in fact, it's very straightforward and works in friendly metaphors that are designed for the non-tech savvy. It's one of the least "techie" of tech tools out there - which is one of the reasons why it's so useful - and so popular. You DON'T have to be a tech expert to get maximum utility out of it - and throughout this book, I'll show you specific ways to put Evernote to use.

You may have thought or heard that Evernote is only a personal productivity tool, and it can be that - but that's just the beginning of how you can use Evernote. If you're like most people, chances are you probably spend most of your waking hours at work - and regardless of your industry, I'm betting that by implementing some of the strategies in this book you'll be able use Evernote to make those work hours more productive and more effective. Evernote wasn't originally designed with businesses in mind - but that doesn't mean it's not an awesome tool to help you and your business. In fact, it's one of the only tools I recommend to almost every single one of my business clients.

I've been using Evernote since shortly after its launch years ago, and truth be told, like many people I didn't "get it" right away. It took me some time to learn how to apply it to me and to my business - and then I was sold. Why? My business is small - and I'm always looking for ways to simplify, centralize, streamline, and basically help me make my life, and my work, easier. Evernote has done that in numerous ways - as you'll see throughout this book.

I've been fortunate in that I get to share the Evernote love with other people. I've helped thousands of people learn about Evernote and how to put it to use in their lives and in their work via my writing, online and in-person training. I'm really excited to share with you the many different ways to put Evernote to work in your business!

A Few Notes on Security and Privacy

Security is important for everyone, but perhaps even moreso for businesses than for individuals. Why? As a business, chances are you're keeping data not just about you yourself personally, but potentially you're also storing information about your customers, partners, vendors, and other key business contacts - information like names, addresses, project details, and other sensitive information that you want to keep away from prying eyes.

For this reason, it's critical that you as a businessperson understand the security and privacy policies of any tool that you put to use in your business. Evernote takes the security of your data very seriously.

Evernote works by letting you capture information (on your phone, computer, or elsewhere), send it to your Evernote account over the Internet (via SSL-level security), and access that data from anywhere, on any device, via your private Evernote account. You can allow other people to access, and if you so choose, edit your data - but whether and when that happens is completely at your discretion - and you can revoke access at any time.

Even though your data is stored at Evernote, they do not monitor or "mine" your data. Some services read the contents of your email and posts, and over time, build a profile about you, which they then use to serve you ads. Or, they use that data and sell it in the aggregate to third-party data miners. As of this writing, Evernote does not do anything with your data - in fact, they are adamant that your data is, in fact, yours.

Concerned about Evernote going out of business? Don't be. If the Evernote service were to go away at any point (or if you just choose to stop using Evernote), you can export all the data you've stored in Evernote to another format which you could then use in another application.

As I mentioned, Evernote takes great pains to make sure your data is safe. Evernote has encapsulated their philosophies on security into their 3 Laws of Data Protection:

- Your Data is Yours
- Your Data is Protected
- Your Data is Portable

Evernote CEO Phil Libin wrote a blog post further explaining these policies. It's worth reading to get a better understanding of Evernote's perspective on security and privacy.

Which Evernote Edition is Right for My Business?

Evernote comes in several different editions, and which one you choose will depend on your needs and the needs of your business.

Evernote (free) - *Best for individuals*
The free edition of Evernote lets you capture and store most types of information (text notes, web clippings, images, and documents). Many individuals find that the free edition of Evernote is enough to meet their needs - at least for a time. But once you start *really* using Evernote as a repository for your information, you'll probably find that you run into the monthly upload limit of 60 MB, or you may find that you want to share a notebook and collaborate on the notes inside of it. For that, you'll need…

Evernote Premium ($5/month) - *Best for power users, freelancers, consultants, solopreneurs, and micro-businesses*
This tier of Evernote is suitable for the power individual user or very small business, as it lets you upload lots of information to Evernote and collaborate on it with other people (inside or outside your company) via shared notebooks. You also gain some enhanced offline features and support. My favorite Evernote Premium feature is the ability to search within PDFs and other attached files that you've dragged into Evernote. This becomes super-useful if you create any sort of document repository (as we'll see a bit later on in this book).

Evernote Business ($10 per user/month) - *Best for small- to medium-sized businesses*
Specifically designed to meet the needs of small businesses, the aptly-named Evernote Business gives businesses the power and all the features of Evernote Premium - being able to capture, organize, find, and share information - and adds business-level administrative and billing control, as well as the ability to quickly and easily create dedicated company-only notebooks that everyone on your team can access. Your team will also be able to automatically find relevant notes that colleagues have created related to the work you're doing with the Related Notes feature. Since the needs of businesses are different than the needs of individuals, Evernote Business comes with a dedicated support team at Evernote to help answer your questions.

With Evernote, you do have the ability to upgrade and downgrade between editions - and when you do, your data can move with you. You can always start with one edition and "graduate" to a higher level if you find that you need the additional features that a higher tier offers.

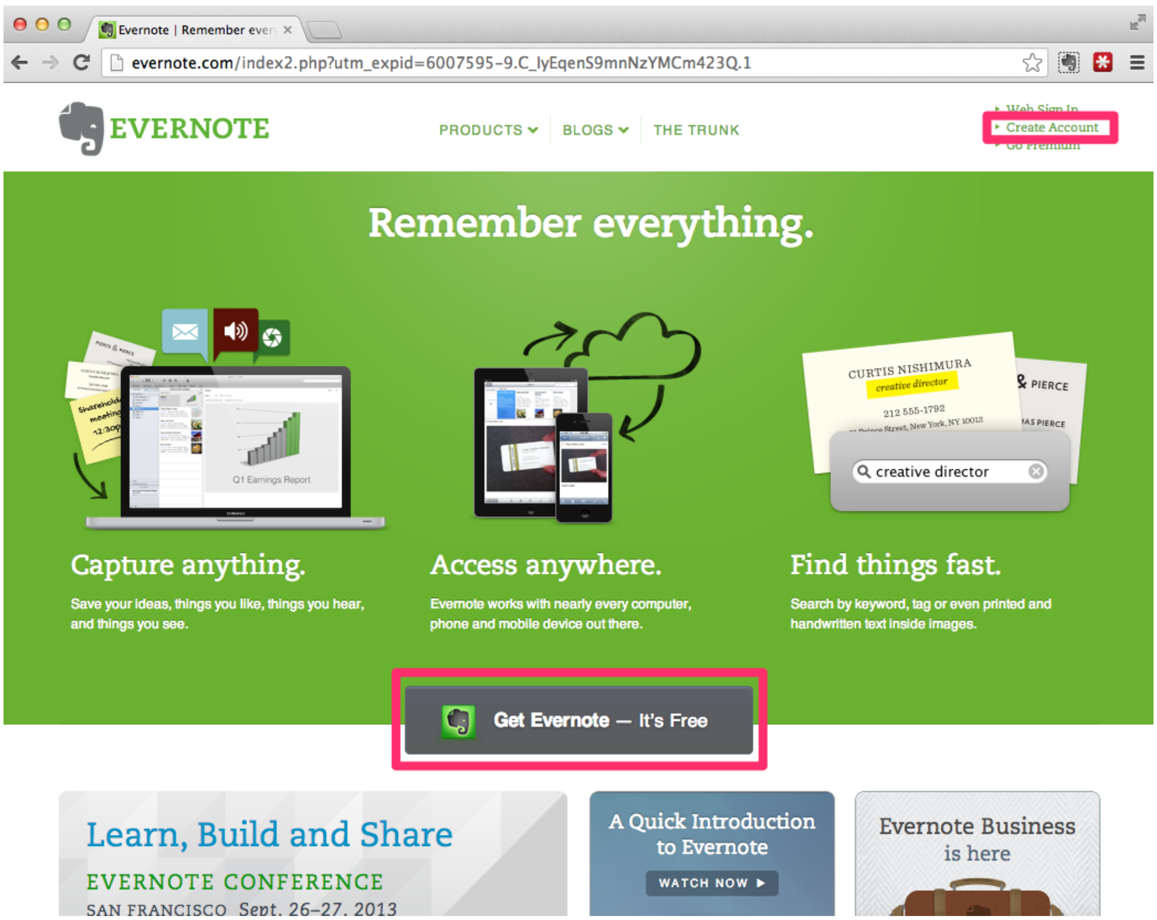
Here's a guide to help you compare the three Evernote editions:

	Evernote Business	Evernote Premium	Evernote (Free)
Per-Note Upload Limit	100 MB	100 MB	25 MB
Total Monthly Upload Limit	2 GB (per user)	1 GB	60 MB
Total Note Limit	100,000	100,000	100,000
Total Notebook Limit	250 (per user)	250	250
Shared Notebooks for Collaboration	X	X	
Business Notebooks	X		
Offline Notebooks	X	X	
Related Notes	X	X	
Note History	X	X	
Faster Image Recognition	X	X	
Search Inside PDFs and Files	X	X	
PIN Lock on Mobile	X	X	
Support	Dedicated	Priority	Standard
Simplified Admin	X		
Hide Ads	X	X	
Pricing (USD/month)	$10 (per user)	$5	Free

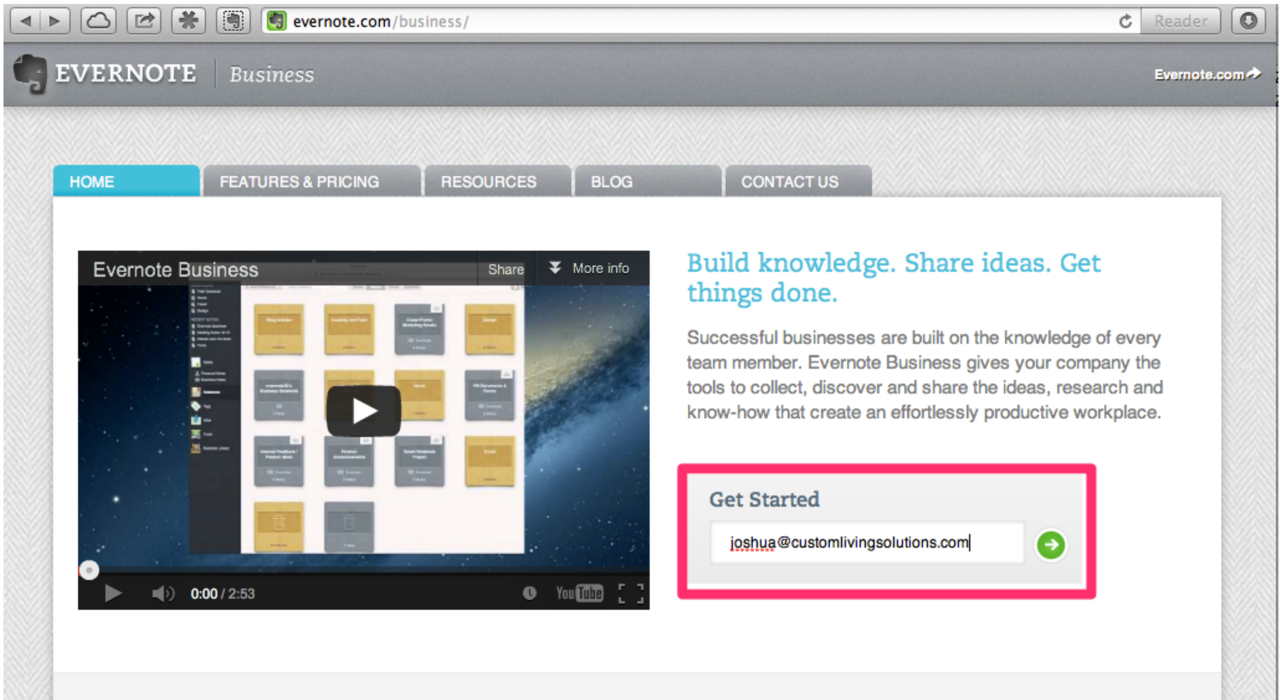
Setting Up an Evernote Account

To get started using Evernote free or Evernote Premium, just go to www.Evernote.com. From there, you can either click on "Create an Account" or "Get Evernote, It's Free" - the former will prompt you to create an account and then download the Evernote software, the latter will prompt you to download the Evernote software to your computer and then create an account.

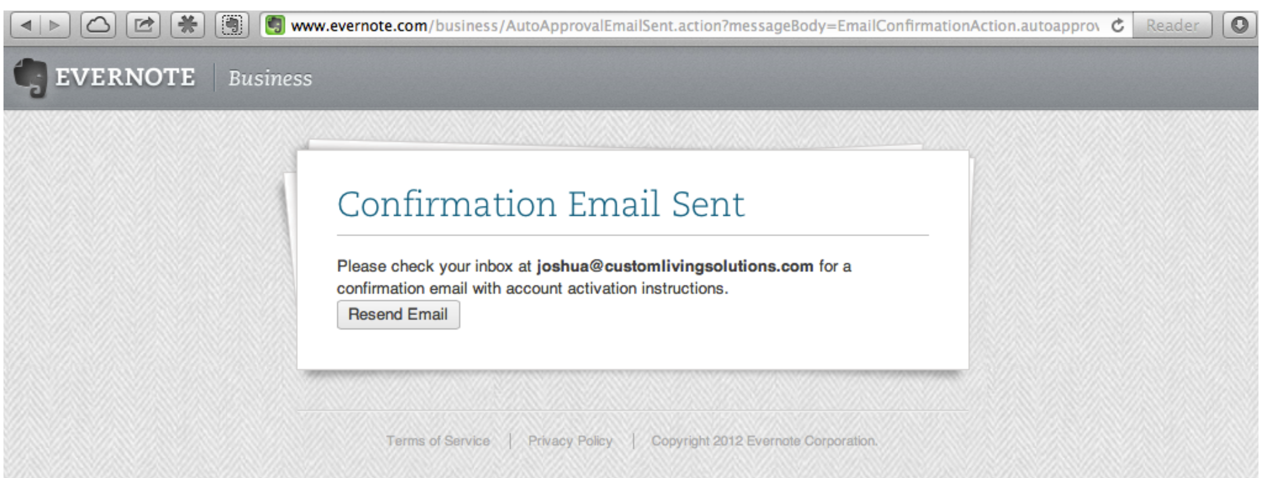
Once your account has been created, you can then choose to continue using the free edition or you can follow the prompts to upgrade to Evernote Premium (you can also upgrade at any point - you don't have to do it immediately).



To get started using Evernote Business, go to www.Evernote.com/business and then enter your email address.

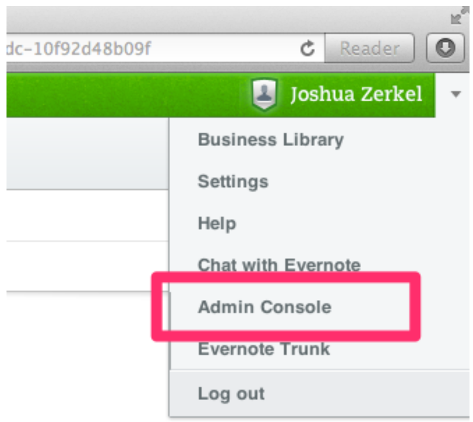


You'll get to a confirmation screen that looks like this one.

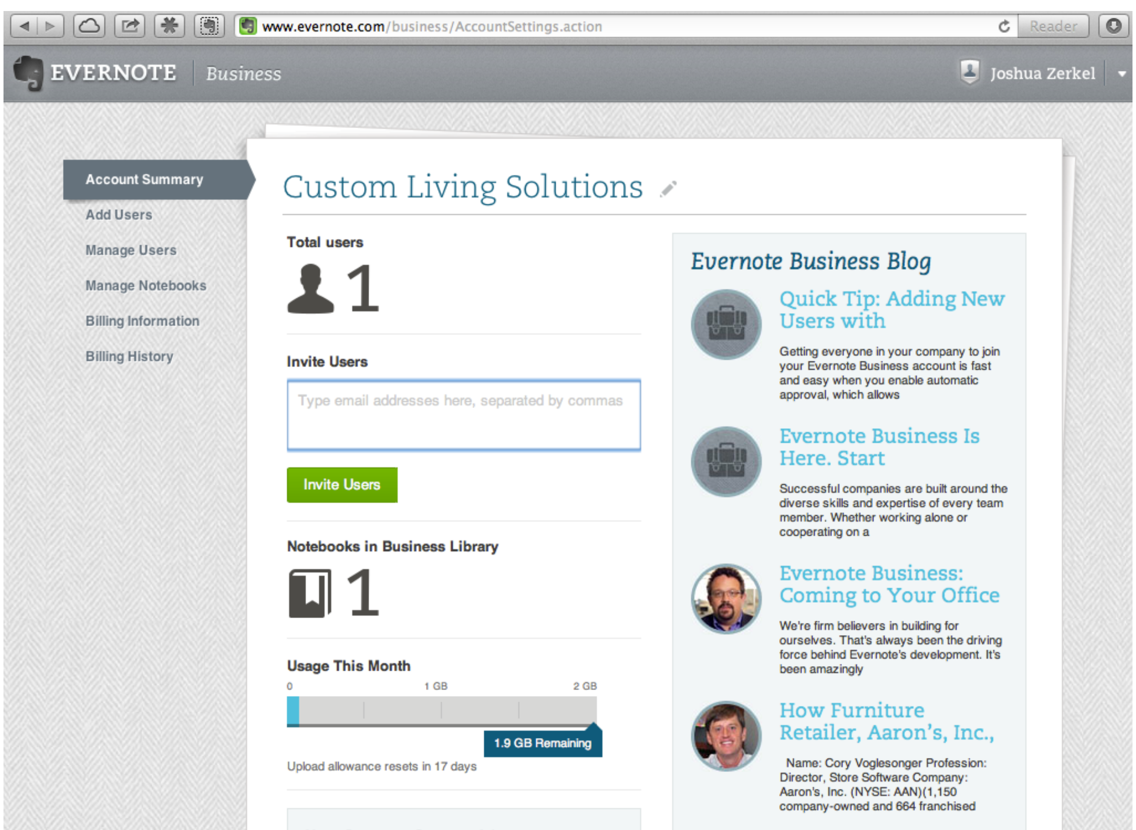


In the email that you receive you'll be prompted to complete the signup process, including billing and how additional users get added. It's pretty straightforward.

Once that's done, when you need to administer your Evernote Business account (modify how users get added, change billing information, or just see what's going on with your Evernote Business account), you'll want to log in at www.Evernote.com, then click on the triangle next to your name and select Admin Console.



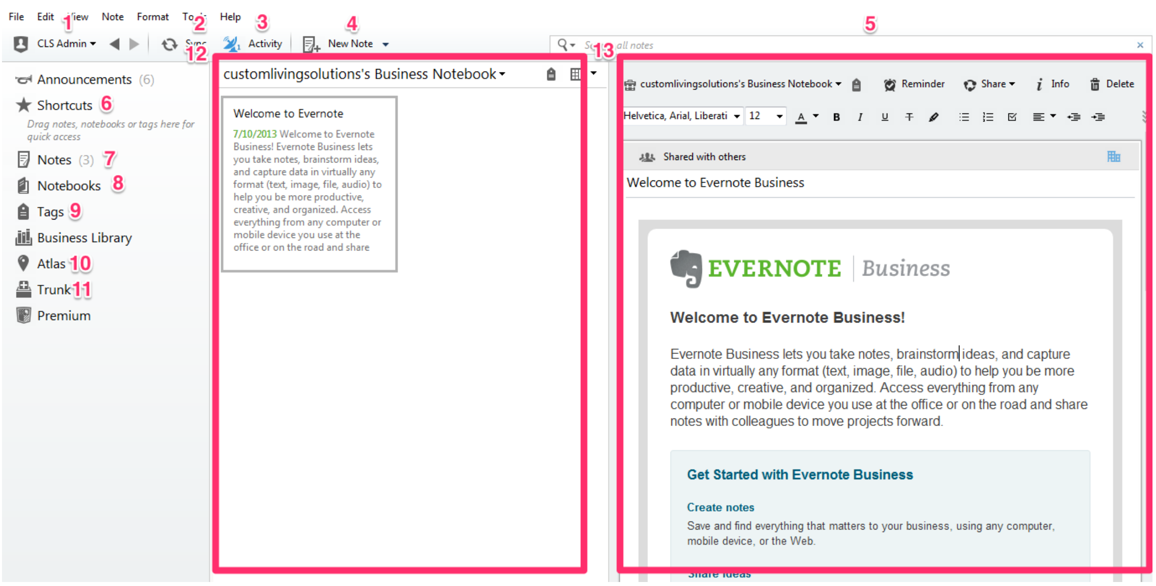
Once there, you'll be able to monitor your account activity - number of users, notebooks, monthly uploads, etc., as well as add/remove users, modify billing, etc.



Your Personal Evernote Tour

You'll do most creating, organizing, accessing, and generally working with your notes in Evernote from within the application itself either on your computer or on your mobile device. In this book, I'll be showing you screenshots of Evernote for Windows - but the concepts are generally the same whether you're on Mac, Windows, or if you use the web version of Evernote. Evernote is designed to match the look and feel of the platform that you're on – so the Windows version of Evernote looks like a Windows app, and the Mac version looks like a Mac app – but the essential functionality is the same regardless of platform. Your notes are the same regardless of where you access them and which platform you access them on.

When you work with Evernote, you'll spend some quality time with the following screen. I'd like to familiarize you with its key components.



1. Account Tab - You can get your account status (upload allowance, etc.), Evernote email address (more on that later), and switch accounts from here.
2. Sync - Evernote syncs your data automatically between your devices and Evernote's cloud servers at pre-set intervals. However, if you want something to sync immediately, just click this button.
3. Activity - Shows you what's been updated or changed in any shared notebooks that you've joined.
4. New Note - Creates a blank note in the notebook of your choosing.
5. Search - Lets you find your notes in a flash using keyword or text search. Also lets you search inside of images that contain text.
6. Shortcuts - Have a few notes or notebooks you use all the time? Drag them to the Shortcuts bar and you can access them instantly.
7. Notes - Shows you all your notes, regardless of what notebook they are

stored in.

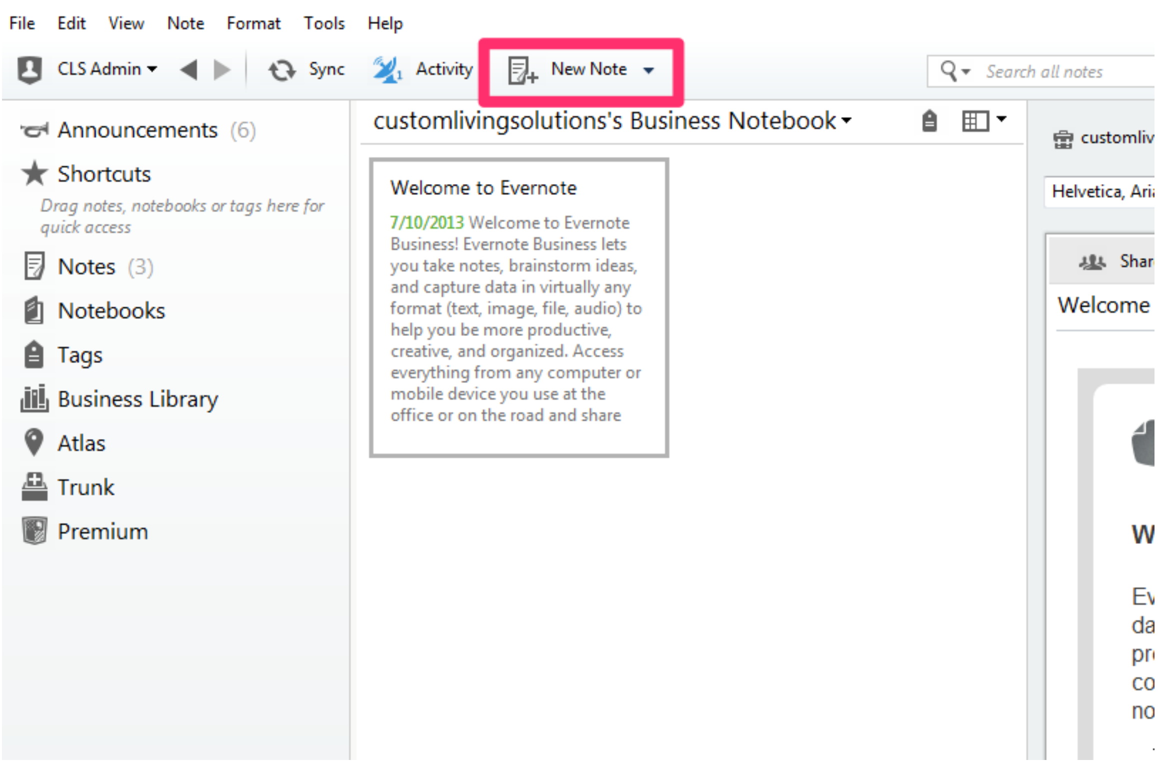
8. Notebooks - Shows you all your notebooks, along with how many notes are within each. From here, you can create stacks (a notebook with other notebooks inside), share notebooks with other people, delete and rename notebooks, and more. You can expand and collapse this view on the sidebar.
9. Tags - Lets you create tags you attach to notes, which can let you organize your notes regardless of what notebook they're stored in.
10. Atlas - Displays a geographical view of where your notes were taken. Especially helpful if you use Evernote on your tablet or smartphone, as notes you create there can (with your permission) include GPS-based information.
11. Trunk - Tools and applications that integrate with Evernote to extend its functionality and let you do more.
12. Note List (Card View shown) - Displays all your notes that reside within a selected notebook. You can choose other display options (Card View, List View, etc.) depending on your personal preference.
13. Note Editor - This is a single note, or piece of information, within Evernote. In this case, it's showing the note that Evernote automatically puts into your account when you first get started. The icons along the top let you send a note to the trash, share or send it, and get more details about it (word count, etc.). The second row of icons let you format the text, add checkboxes, tables, and more.

Depending on what computer system you're on, this screen may look somewhat different, but the functionality is essentially the same across your various devices. Regardless of the device you're on you're still able to create, organize, access and share notes - even if Evernote itself looks a bit different.

What is a Note?

When you start putting your information into Evernote, each piece of what you capture is encapsulated into a document called a note. Notes form the basis of everything that you'll be doing inside of Evernote.

You can create a new note by clicking on the "New Note" button at the top of the Evernote window.



A note can be any one (or a combination) of:

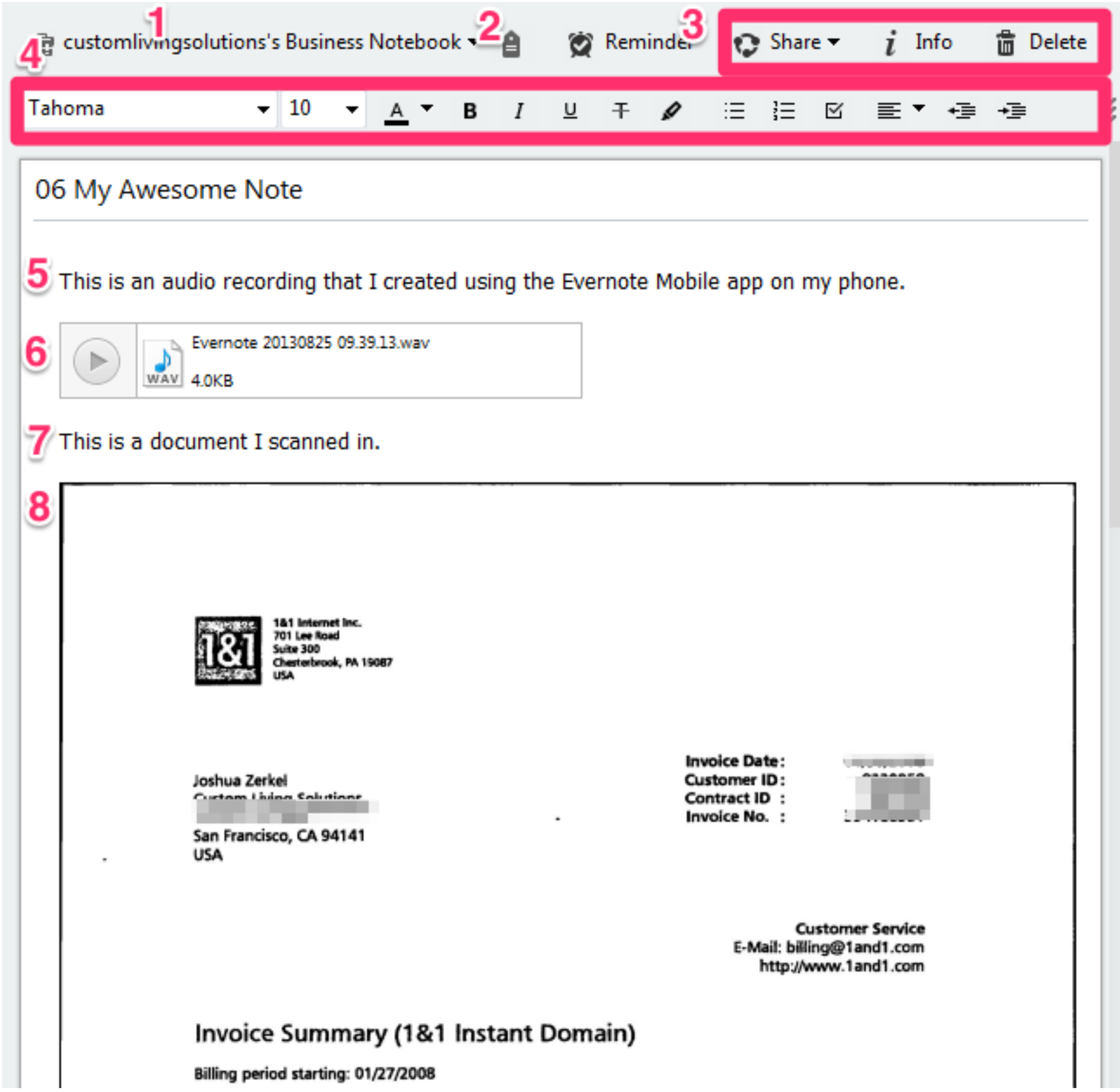
- Typed text
- Audio recordings
- Screen captures
- Images and photos
- Documents (Word, Excel, etc.)
- PDF files
- Clips from web sites that you've visited
- Web links
- Scanned papers
- Emails you've forwarded in
- Synchronized data from other Evernote apps
- And more!

Essentially, if you can get information into your computer, it can generally be stored in a note. This flexibility is one of the things that makes Evernote so powerful! The overall volume of what you can store is limited only by the upload allowance of the edition of Evernote you're subscribed to.

To get PDFs or documents into Evernote, just drag them on top of a note you've created, or drag them on top of a notebook and a new note will automatically be created for each document. While Evernote is happy to store your non-Evernote documents (Word, Excel, PDF, etc.), it will not let you edit a document directly inside of Evernote. To edit one, double-click on it and it will open in its native application. When you save it, it will automatically be saved back into the Evernote note where you'd stored it.

An often-overlooked feature is Evernote's built-in ability to create new notes from forwarded emails. To learn more about this super-useful technique, check out *Chapter 24 - Don't Steal - Swipe!*

Let's take a look at a note that I've already created to see its various components. In the example below, I've created a note with multiple elements - text, an audio recording, some more text, and a scanned-in document.



Here's the breakdown:

1. This drop-down menu lets you choose what notebook this note lives in.
2. If you're fond of tagging, just click in this section to add tags to your note.
3. Note Modification - These icons, respectively, let you send a note to the trash, share or send it, and get more details about it (word count, etc.).
4. The formatting bar lets you modify text font and style, along with creating bullets, numbered lists, checkboxes, tables, and separators. Depending on your computer, you can also add an audio or photo note, and add attachments to your note.
5. You can simply type text into Evernote.
6. This is an audio recording that was created using the Evernote mobile app on my phone. You can play it directly inside of Evernote.
7. More text that was typed in.
8. This is a document that was scanned and then dragged into the note. You

can drag in basically any type of file to add it to your note.

As you can see, a note can have many elements - or just a few. It's up to you! Experiment with creating notes and bringing in different elements. It's worth spending a few minutes getting comfortable with the various ways to add information into Evernote.

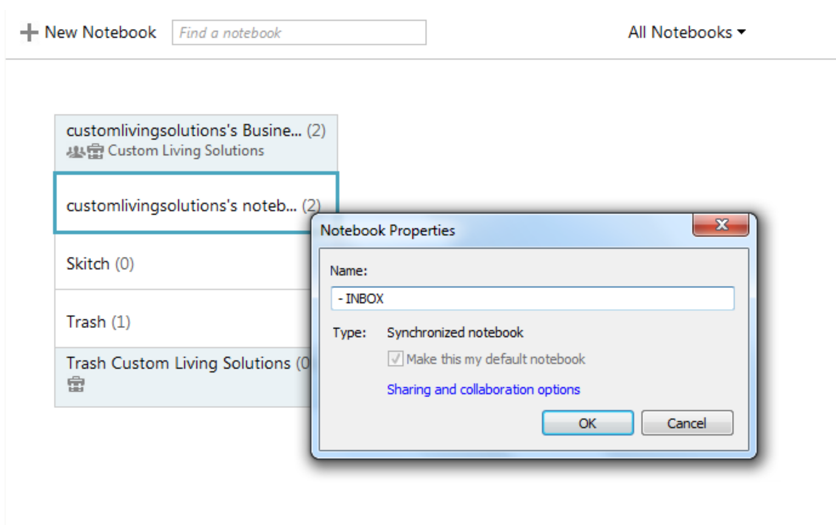
One important thing to keep in mind is that there is no "save" button in Evernote. Anything you type or drag into a note is automatically saved as soon as you create it. The next time Evernote syncs, it will also show up on any of your other devices.

Any new note that you create by default will be stored in your account's default notebook, which is automatically created when you open your Evernote account. Typically, it's the same as your username - for instance, if my Evernote username is *JoshuaZerkel*, my default notebook would be *JoshuaZerkel's Notebook.*

Because this notebook acts as an inbox of sorts for any note you send in or capture, I think it's helpful to rename it to "- INBOX." Why? The "inbox" metaphor is something most of us can instantly recognize, whereas "YourName's Notebook" may be harder to grasp.

Also, by putting a " - " before the name of the notebook, it will always show up at the very top of your notebook list (which will likely grow rapidly if you follow the steps in this book!). Since this is your default notebook, you want to be able to find it quickly and easily.

To rename your default notebook, click on “Notebooks” on the sidebar, then on the notebook you’d like to rename, click the gear (Settings) icon, and change the notebook name.



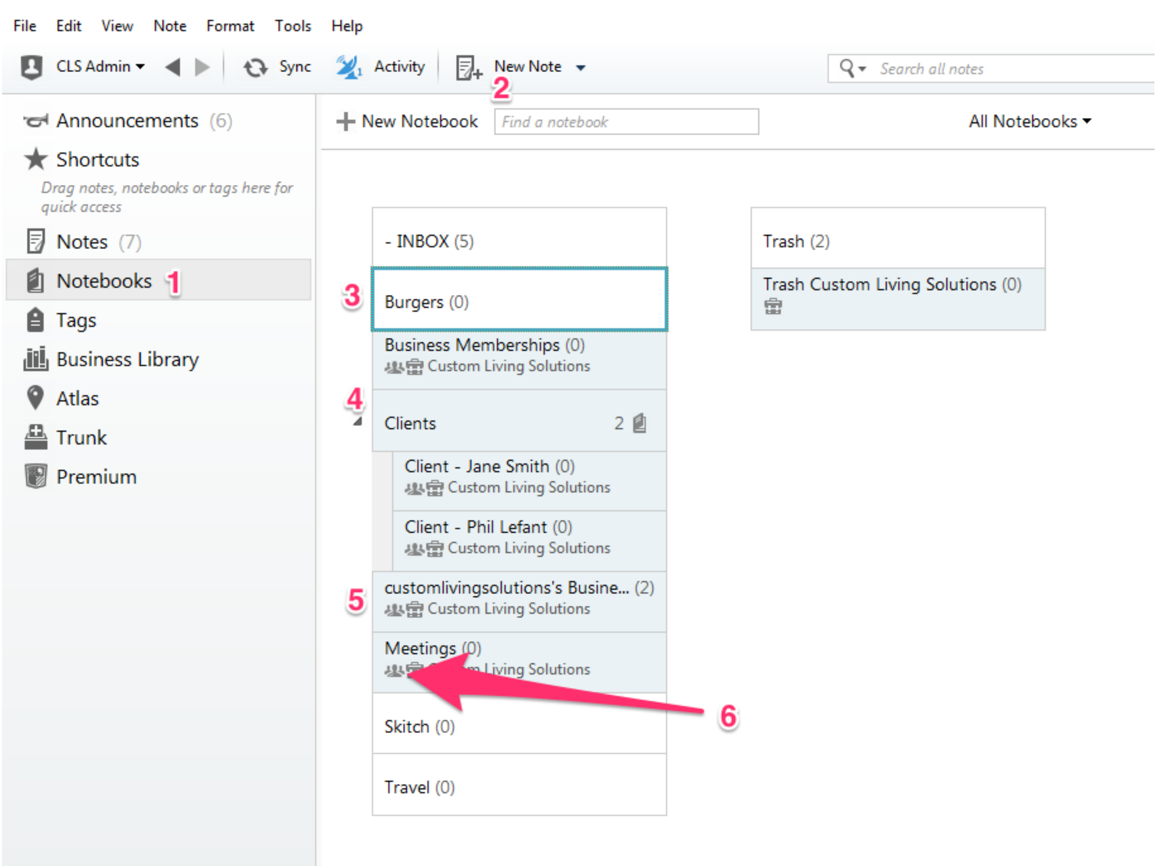
Notebooks – Personal, Shared, and Business

Notebooks are simply groups or collections of notes, which can help you keep things organized in your business. As of this writing, you can have as many as 250 notebooks.

In addition to creating notebooks, you can also create notebook stacks - essentially, multiple notebooks inside of another notebook. This is somewhat like having nested folders, and can help keep you organized if you have a master topic with related sub-topics (for instance, a client with multiple projects could have a master notebook with notebooks within for each project).

It's worth noting that you can only have sub-notebooks one level deep - you can have a notebook with notebooks inside of it - but those notebooks can't have notebooks inside of *them.* So plan accordingly.

To access, add to, and modify your notebooks, click on the Notebooks icon on the sidebar.



From there, you'll see the following:

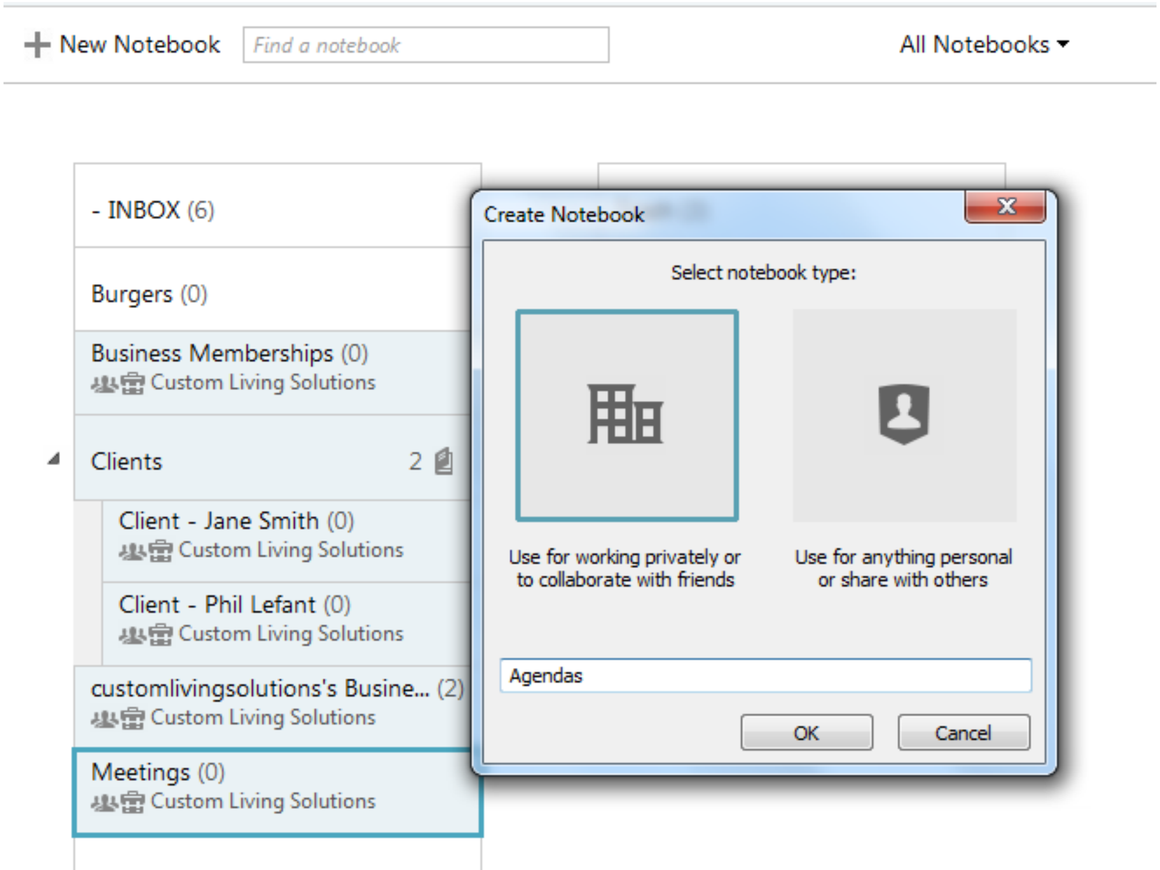
1. The Notebooks icon always brings you back to your notebooks.

2. At the top of the screen, you can add a notebook or search for one you've already created.
3. This is a standard notebook - it's not shared with anyone else and it doesn't contain any sub-notebooks.
4. This is a notebook stack (you can tell by the drop-down triangle (Windows) or white "wrapper" around the notebook (Mac). It also displays how many notebooks are in the stack.
5. This is a Business Notebook (delineated by the grey notebook cover and the briefcase on the cover).
6. This icon lets you know that the notebook is being shared with other people. It's not limited to Business Notebooks - any notebook can be shared.

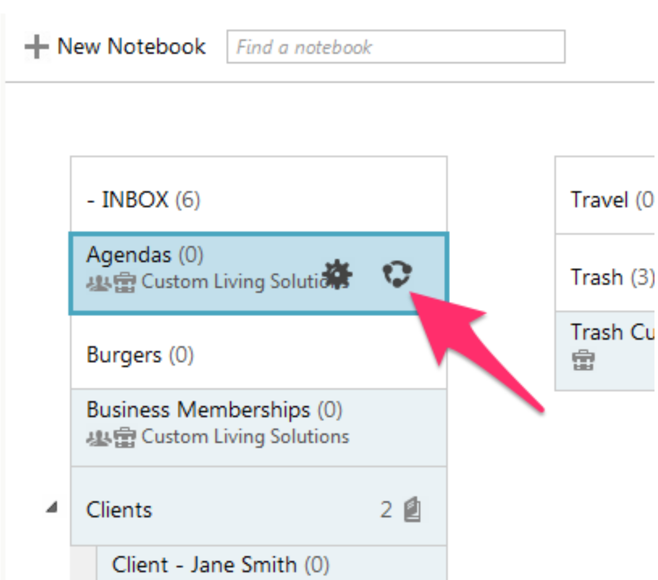
Notebooks, like individual notes, can be shared with other people. If you have Evernote Premium or Evernote Business, other people you specify can view and edit your notes (in the free version of Evernote, they are limited to viewing only). So if you're collaborating with other people on a project, Evernote can be a great place to centralize what you're working on.

If you are using Evernote Business, notebooks work somewhat differently. Your personal notebooks (the brown ones) are separated from your Business Notebooks (the grey ones). The administrator of the Evernote Business account has the ability to add or remove user access from the Business Notebooks, but they have no access to personal notebooks or their contents - they remain private. Notes can be copied or moved between your personal notebooks and your Business Notebooks. When a team member leaves your company, the administrator can revoke that person's access to the Business Notebooks, which will remove them from their account. They'll be left with their personal notebooks only - none of your company's Business Notebooks will be accessible to them any longer. Their personal notes and notebooks remain theirs, even after they've left the company.

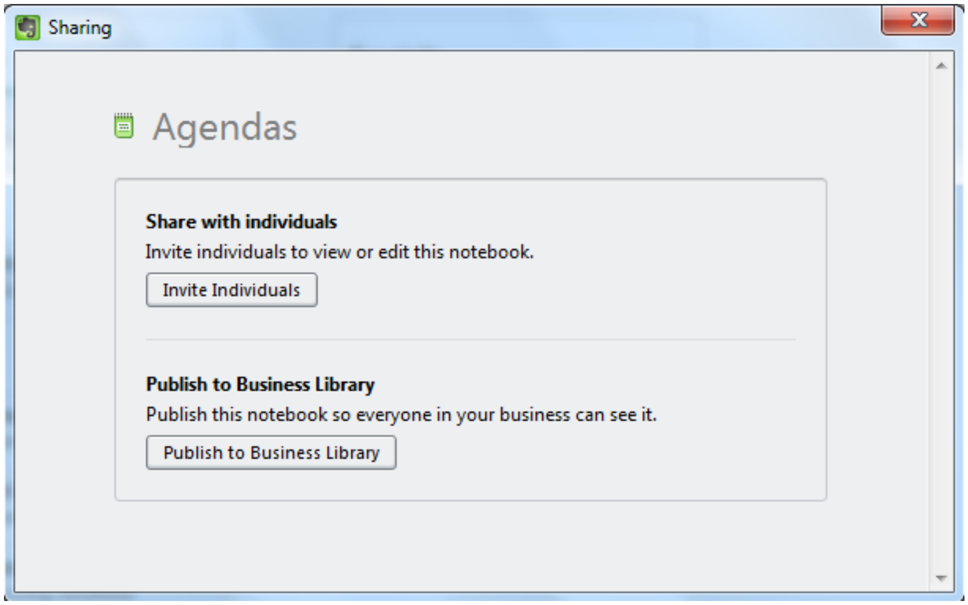
Let's add a Business Notebook to see how sharing works. Click on the "+ New Notebook" button, and create a Business Notebook for "Agendas."



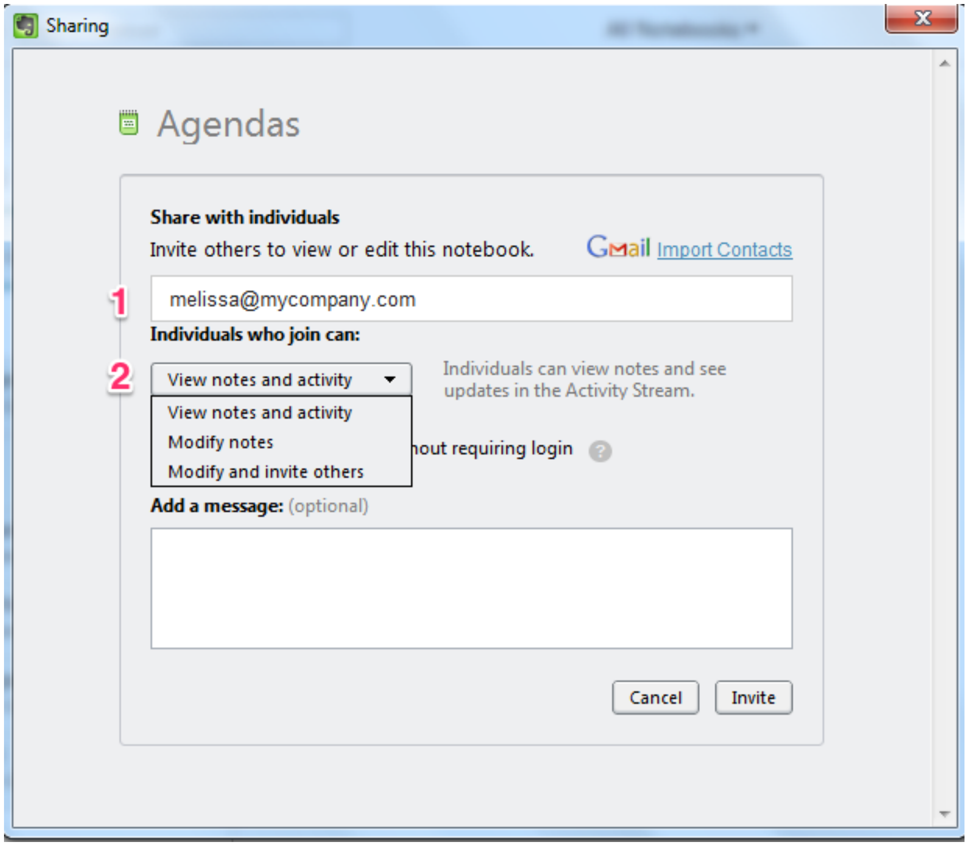
You'll then see it in your notebook list. The grey color, along with the briefcase icon, indicate that it's a Business Notebook. To share it, click on the sharing icon that appears when you hover over the notebook.



A new window will pop up asking you what you'd like to do. From here, you can invite individuals on your team to share this notebook. Click on “Invite Individuals.”



The next screen lets you invite people by email to share this notebook (1), and then control what the people you’ve invited at can do with the notebook (2) - view, modify notes, or modify notes and invite other people to the notebook.



Once you click “Invite,” the recipient(s) will receive an email letting them know that the notebook has been shared with them. They can either view it online in the Evernote web client, or they can download the Evernote desktop app to their computer and then view the notebook inside the app.

Setting Up Your Structure

When you use Evernote personally, how (or whether) you choose to organize your notes is important - but in the end, the only person it really affects is you. In fact, for some of the people I work with, it's been faster and easier for them to NOT organize their notes at all, and instead rely solely on Evernote's powerful search functions to find specific notes when they need them. I call these people "whatever" organizers - because they just do whatever works best! To each his (or her) own - on an individual basis, at least!

The "whatever" organizer approach works best for one person, since they're the only ones that have to work with their system (or lack thereof). In a business, things are different, as there are typically more people involved. Having notes and notebooks structured, organized and accessible is essential to maintaining everyone's productivity.

As you saw in the previous chapter, Evernote lets you organize your notes into notebooks, which can help keep things organized. In addition to notebooks, you can also tag your notes, which adds an additional layer of organization which can be helpful. In my work with clients over the years, I've found that tags are mainly useful for an individual - as they tend to be as unique as the person who created them. For this reason, I won't be covering tags here. Rather, I'll focus on notebooks since those serve a specific business need - sharing of groups of notes.

Especially if you're using Evernote Business in your business, the administrator of your Evernote account will want to spend some time with other key stakeholders in your company to decide how to organize your Evernote Business Notebooks for your company. Mapping out your organizational strategy beforehand will save you lots of time - and headaches - later.

This doesn't have to be complicated, and you don't have to have all the answers right away. That said, it's best to have some framework in place as you're getting started. There are three approaches I've seen work well:

Mirror your existing company existing file structure – to a degree. If you already have a paper or electronic file structure that is working well for you, you're ahead of the game. Evernote is not a file system per se, but certainly adapting some of your existing file structure can be a great place to start. You can set up notebooks and notebook stacks that mirror some of what you already have in place. You'll want to flatten your structure a bit - that is, reduce down the sprawl of and levels within your structure, since Evernote only allows you to nest notebooks one level deep via notebook stacks.

Create a new structure by department or functional area. Most businesses have roles that fall into key departmental areas - administrative, human resources, marketing, sales, production, client service, finance, etc., and you can use these areas to begin building out your Business Notebook structure. The Evernote Business administrator in your company should consult with key stakeholders in each department to help determine what needs to be created.

Build the structure as you go, but control access. Ok, so maybe you don't want to take any of my advice and you don't want to spend time upfront building out your structure. Have it your way! Rather than plan everything in advance, you can just add notebooks as needed, and share with just the appropriate people as you add them (instead of sharing everything with everybody). This way you're limiting the number of Business Notebooks that people will see in their Evernote accounts - they'll only see the relevant ones that you've decided they need to see, rather than everything that has been created.

Regardless of the scheme you use to set up your business notebooks, it's helpful to create a reference document, or Notebook List, so that everyone can quickly get an overview of the structure that's been created. This is simply a list of notebooks and notebook stacks that exist in your company. You'd want to keep this where everyone can see it - most likely in a shared Business Notebook.

If you're unsure where to begin, check out the sample Notebook List I've created for you, which includes ideas for some common Business Notebooks. You can view it in the Appendix.

In addition to creating a Evernote notebook structure that everyone in your business can use, you'll also want to standardize how individual notes will be named. Standardizing this as a process will make it easier for everyone to find the notes they're looking for in a list or in search results. If other people are going to be working with you to create or edit notes, make sure you share the naming convention with them and discuss how to use it. You may even want to create a note about "How to Create a Note" which includes the rules about naming, and store that in a shared Business Notebook!

You want to make sure that the note name contains essential information, such as what the note is about, who created it, its version, and who created or edited that version. The idea is to make it crystal-clear exactly what the note is just from looking at the name.

Putting the four digit year, two digit month, and two digit day is in the note title is important because that will let you sort your notes easily. Yes - this is in the note details, but it's easier to find, and sort, if this sort of information is directly in the note name itself. You can choose to put the date at the beginning or end of a note's name, but putting it at the beginning allows for easier sorting in many cases.

A note naming convention could look like this:

YYYY-MM-DD - CONTEXT/CONTENT - CREATOR INITIALS - VERSION NUMBER

or:

CONTEXT/CONTENT - CREATOR INITIALS - VERSION NUMBER - YYYY-MM-DD

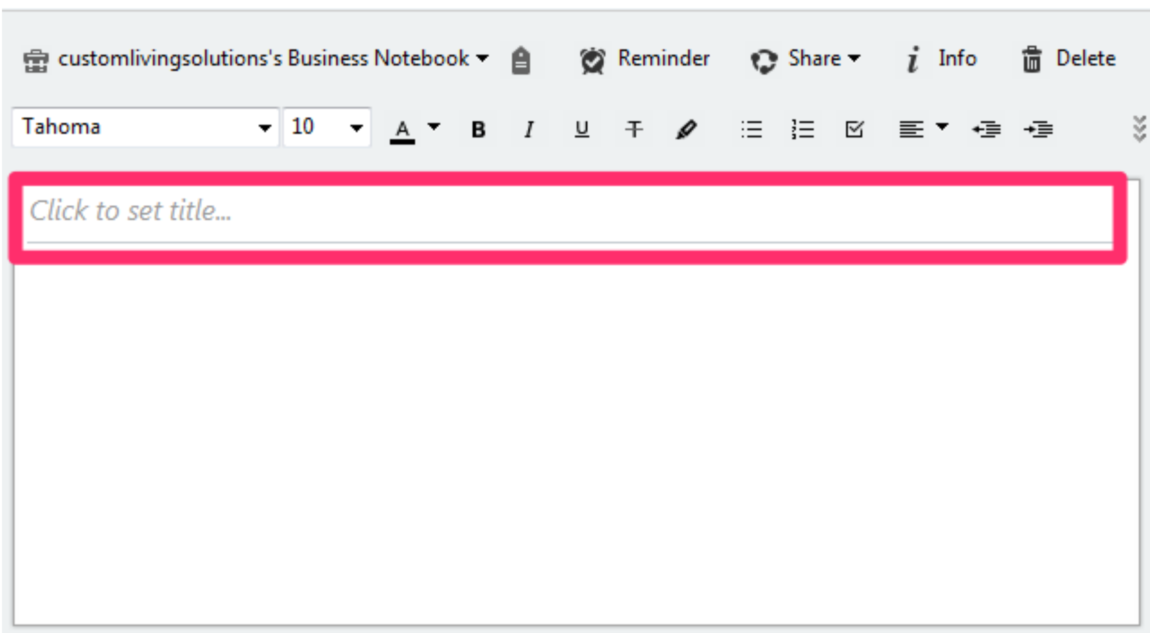
So your business license might look something like this:

2013-01-15 - Acme Corp Business License - JZ - V1

or:

Acme Corp Business License - JZ - V1 - 2013-01-15

You can enter or edit a note's title simply by clicking in the title area to edit, as shown in the example below.



Standardizing your note names will make it a lot easier for everyone at your company to find what they're looking for. This is particularly true if team members are dragging documents into notes or scanning paper files into Evernote, as these items may not automatically generate useful titles.

I know that setting up your structure isn't necessarily the most exciting thing you can do with Evernote. That said, it is one of the most important things you can do - if you don't, you're likely to end up with a disorganized mess of notebooks and notes - which will make it hard for anyone to get maximum value out of using Evernote in your business.

Introducing Evernote to Your Company

So you've decided to give your business the gift of organization via Evernote. Great! Now how are you going to let everyone know how to use it - and why they should?

This is where I've seen a lot of businesses run into trouble - the decision maker gives everyone access to Evernote, but team members don't know the ins and outs of how to use it, don't have a clear idea of how to structure and access information, and really have no sense of why it's being implemented at all. Typically, this results in lackluster adoption by many, and for those who do use it, what gets created is generally a mess as each individual creates notes and notebooks on an ad-hoc basis according to their own structure - if they have one at all.

For this reason, you need to have a plan for how you're going to deploy Evernote to your group or team. Don't expect everyone to "just get it" by osmosis!

Here are the steps you'll want to take:

1. **Set a launch date.** Once you have a date for when you'd like to roll out Evernote to your group, you'll be able to create a timeline and work backwards from there.
2. **Identify a point person to act as admin.** This person will need to be able to communicate with team members that need help with using and implementing Evernote, in addition to monitoring and administering Evernote within your company.
3. **Communicate that Evernote is coming to your team.** Most people don't like change, and they typically don't like surprises - especially when it comes to tools they use to do their work. Send an email or have a brief meeting to let everyone on your team know what Evernote is, why it's being deployed in your business, and how it's intended to help everyone be more productive and organized. This is an opportunity to get everyone excited!
4. **Choose which edition of Evernote you'll need.** We've explored the differences between Evernote Business, Premium, and free - decide what features are right for your business, and set up your accounts accordingly.
5. **Set up your notebook and note structure.** Decide what notebooks will be needed in your business, and create them. Plan in advance how notes are to be titled.
6. **Create reference docs.** While you're deciding on your structure, note down the structure itself as well as your note naming convention. Then you can add these to a shared Business Notebook for everyone to reference.
7. **Share a number of Business Notebooks right away.** This is a good way to get people familiarized with the different types of notes that can be

created, as well as how it's helpful to have things centralized.

8. **Install Evernote on everyone's workstations.** Now that you have a structure and some sample content, it's time to get Evernote on your team's computers. Work with your IT staff if necessary to make sure everyone is on the same version and that their accounts are set up properly.
9. **Launch with a training session.** Once your team has Evernote on their computers, they need to be trained how to use it. Show them how to create notes and notebooks, and familiarize them with the structures and naming conventions you've set up. Let them try sharing notebooks and notes with other team members. If you're using Evernote Business, explore with them the differences between their personal notebooks and your company's Business Notebooks.
10. **Expect questions.** After the initial rollout, your company's Evernote admin will likely field a number of questions about how to use Evernote. Make sure everyone on your team knows who to contact, and be ready to answer questions as they come up. **TIP** - You can create a shared notebook with Evernote questions and answers in it that everyone can access!
11. **Monitor.** It's up to your company's admin to continually monitor notebooks and notes to make sure that they are adhering to your company's standards. Make any edits as needed and inform team members about changes and why they're happening.
12. **Follow-up.** About a month after launch, check back with team members (either individually, via a survey, or via a follow-up training class) to find out how the deployment is going (what's working and what isn't), and make any needed changes.

Now that your business has been introduced to Evernote, it's time to put it to use. In the chapters that follow, I'll show you specific ways to leverage the power of Evernote in your business that can save you and your team members time and money. I'll use my company as an example and show you step-by-step how put Evernote to work for you.

Read on!

Part 2

Business Foundations

Employee Document Central

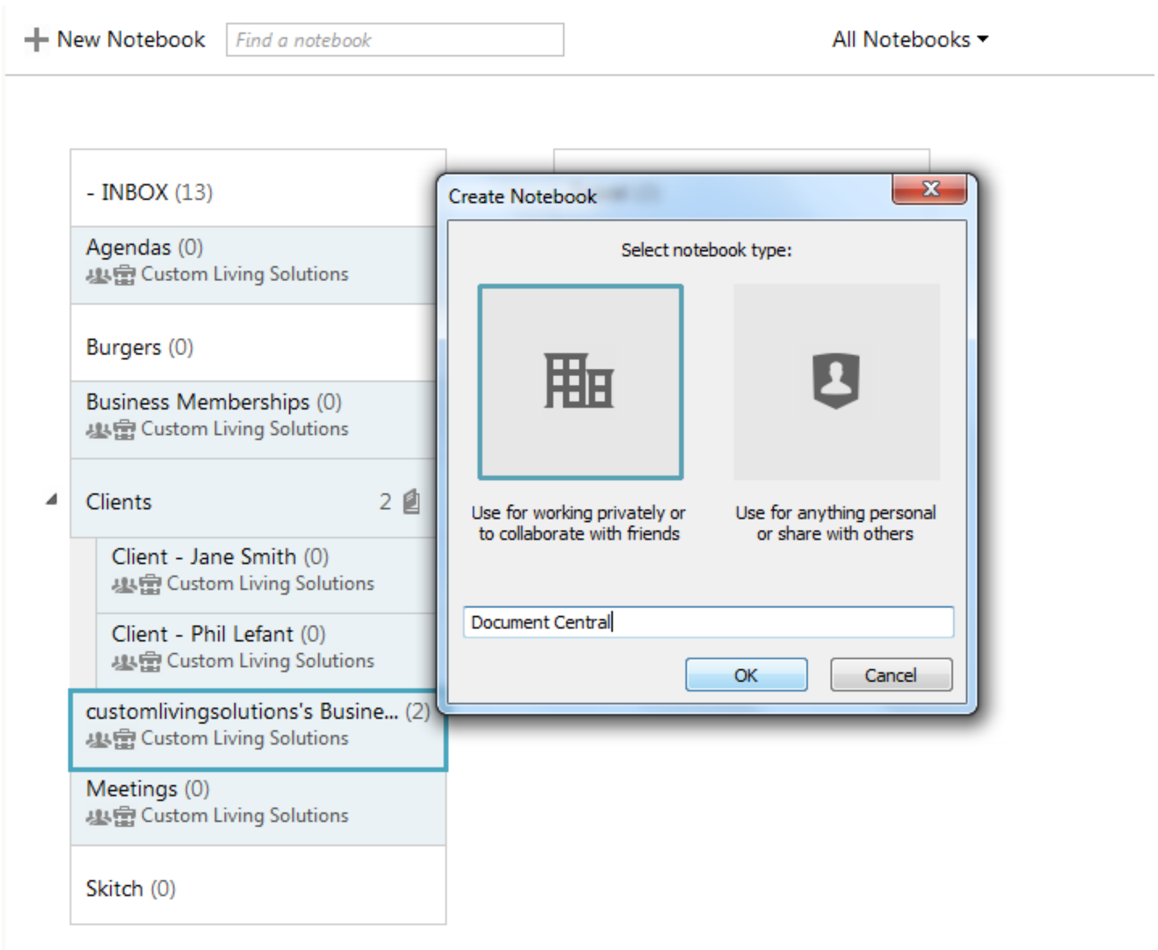
When your company grows past the solo-preneur or individual stage, it starts to become essential for team members to be able to access key documents, forms, and other information at any time. As the team expands, having this information centralized makes it easy for everyone to find what they need without having to ask around to find what they're looking for.

Evernote makes creating this sort of central repository really easy. In fact, I think it's preferable to creating a wiki or intranet. Why? It's most cases, it's much simpler and faster to set up a shared notebook in Evernote than it is to set up a dedicated wiki or intranet, it's easier to update, and it usually incurs less administrative overhead and cost as well.

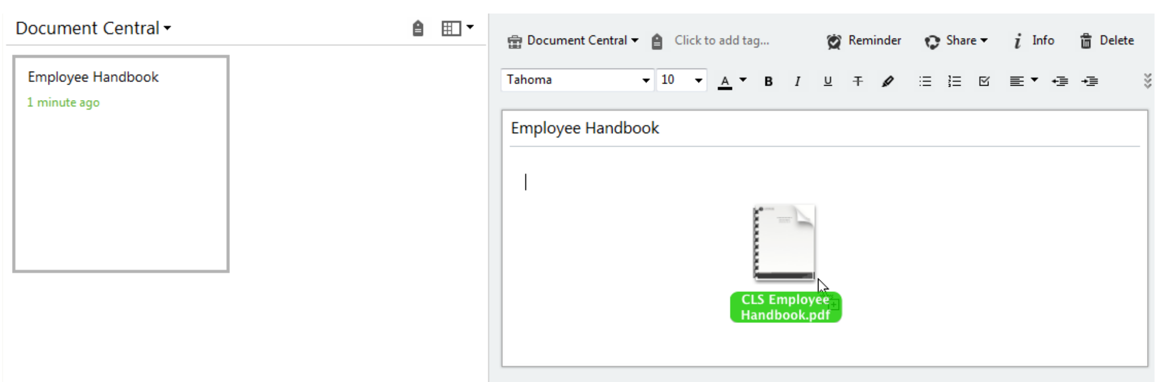
If you're creating your own "document central" at your company using Evernote, a good place to start is with the documents and information that virtually everyone at your company would need to reference, including:

- Your company's mission and/or goals
- The team directory
- Employee manuals or handbooks
- Personnel forms (used during hiring, transitions, etc.)
- Approval forms (for vacations, leaves of absence, etc.)
- Key checklists that team members need to use

To start creating your own document central, first set up a new notebook (if you're using Evernote Business, you'll want to create a new Business Notebook), and title it Document Central.

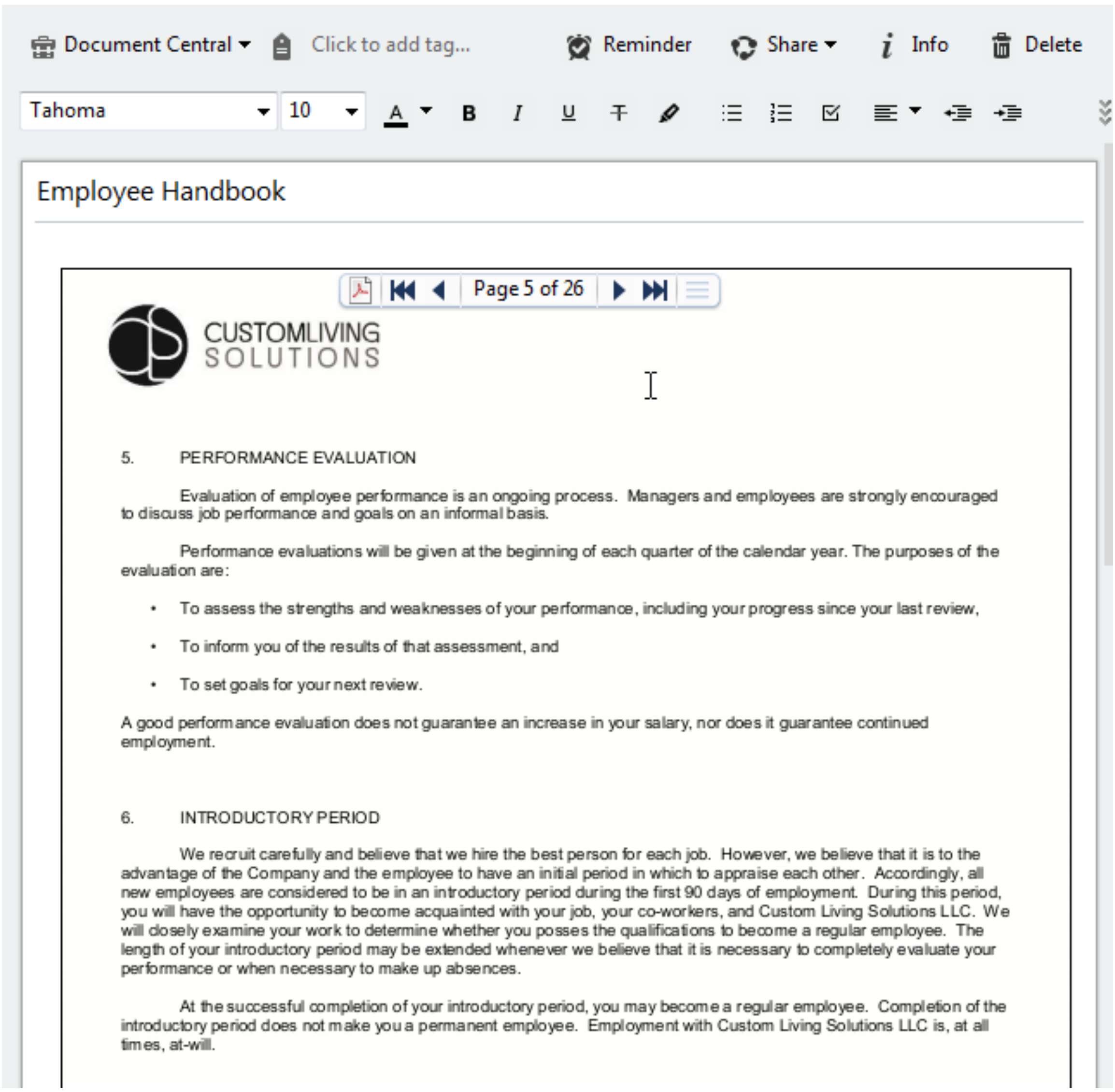


Then you can create notes for the documents you want to centralize. For example, I'm going to create a new note for my Employee Handbook. Once a note is created, you can drag in your existing documents - for instance, in this case I'm bringing in my existing Employee Handbook that I have as a PDF.

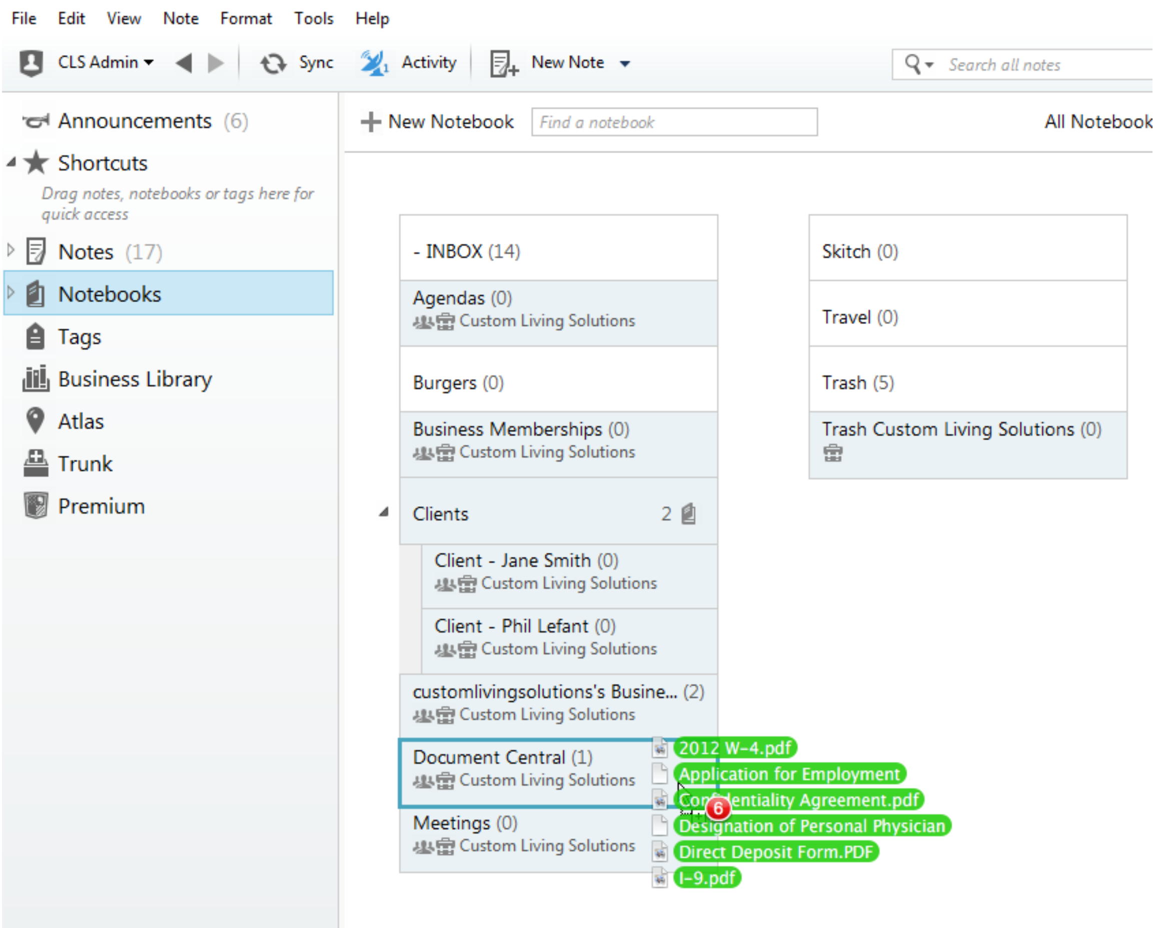


Once a document has been brought in to Evernote, a copy is created inside of Evernote and attached to the note, and the original is still on your computer in its original location. The version that's in Evernote can now be viewed by anyone that the note or notebook has been shared with. If they have editing privileges, they can make changes to the document as well.

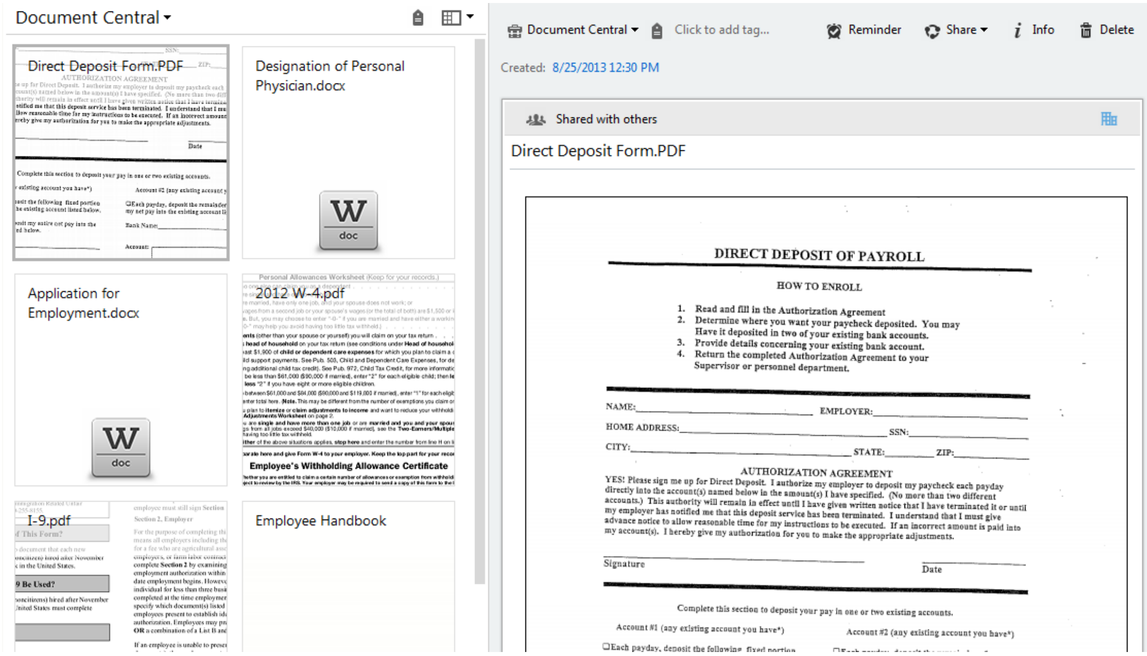
This is what your document will look like once it's been brought into Evernote. PDFs and image files display right inside of the note, while some formats can sometimes be viewed via Quick Look, and others will open in their respective apps. In this case, my Employee Handbook was a PDF, and is viewable inside of Evernote.



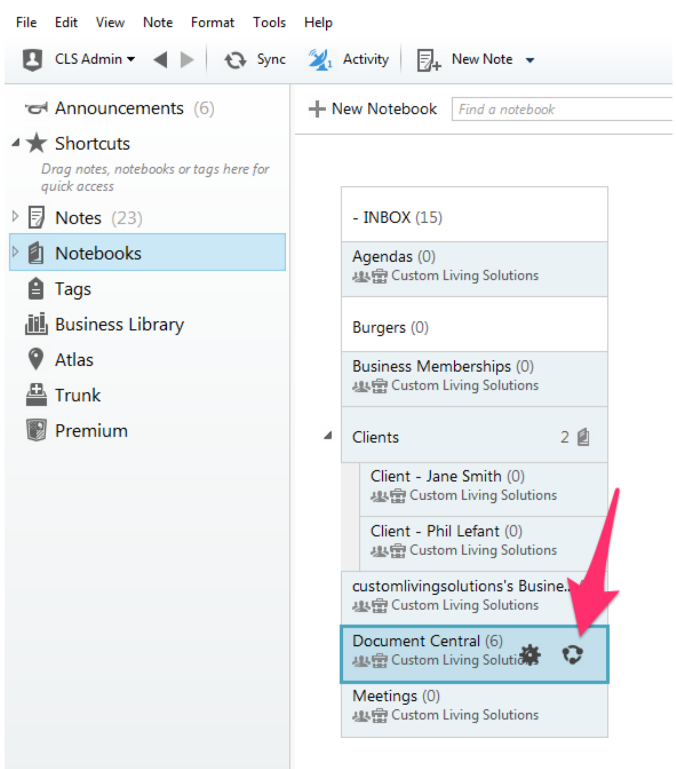
A quick way to add documents to your document central is to click on the Notebooks icon on the sidebar to open the Notebooks view. Then, you can simply drag one or several documents directly onto the notebook.



A new note will be created automatically for each one of the documents you've brought in. This can save you quite a bit of time if you have a lot of documents that you'd like to add to your central repository.



Now that your document central has been created, it's time to share it. Click on the sharing icon to open the sharing control panel.



Consider how best to share as you choose who you want to share notebooks with. Each department, team or group may have docs that are important to them that they need to see and edit. In other cases, you may be sharing documents, such as company policies, which should only be viewed but not edited. Choose which options (view, modify, or modify and invite others) for sharing make the most sense for how you want team members to interact with your notebooks.

Make sure to follow the employment and human resources laws of your jurisdiction, and share (or don't share, as the case may be) your notebooks accordingly. You'll want to consult with a human resources specialist or attorney before publishing or sharing your documents, as anything you distribute in writing may automatically become a legal document. You'll likely also want employees to sign a document saying they've received, reviewed, and know how to access any documents you've shared with them (this is particularly true in the case of human resource documents).

Policies, Please!

Your policies are rules that govern how your business operates. They help by giving you guidelines to follow when a decision is needed - rather than making every decision on the fly, policies serve to standardize decision-making over time. Essentially, they help inform the "this his how we do business here" discussion.

Polices can be created for many aspects of your business, including (but certainly not limited to) internal policies, such as:

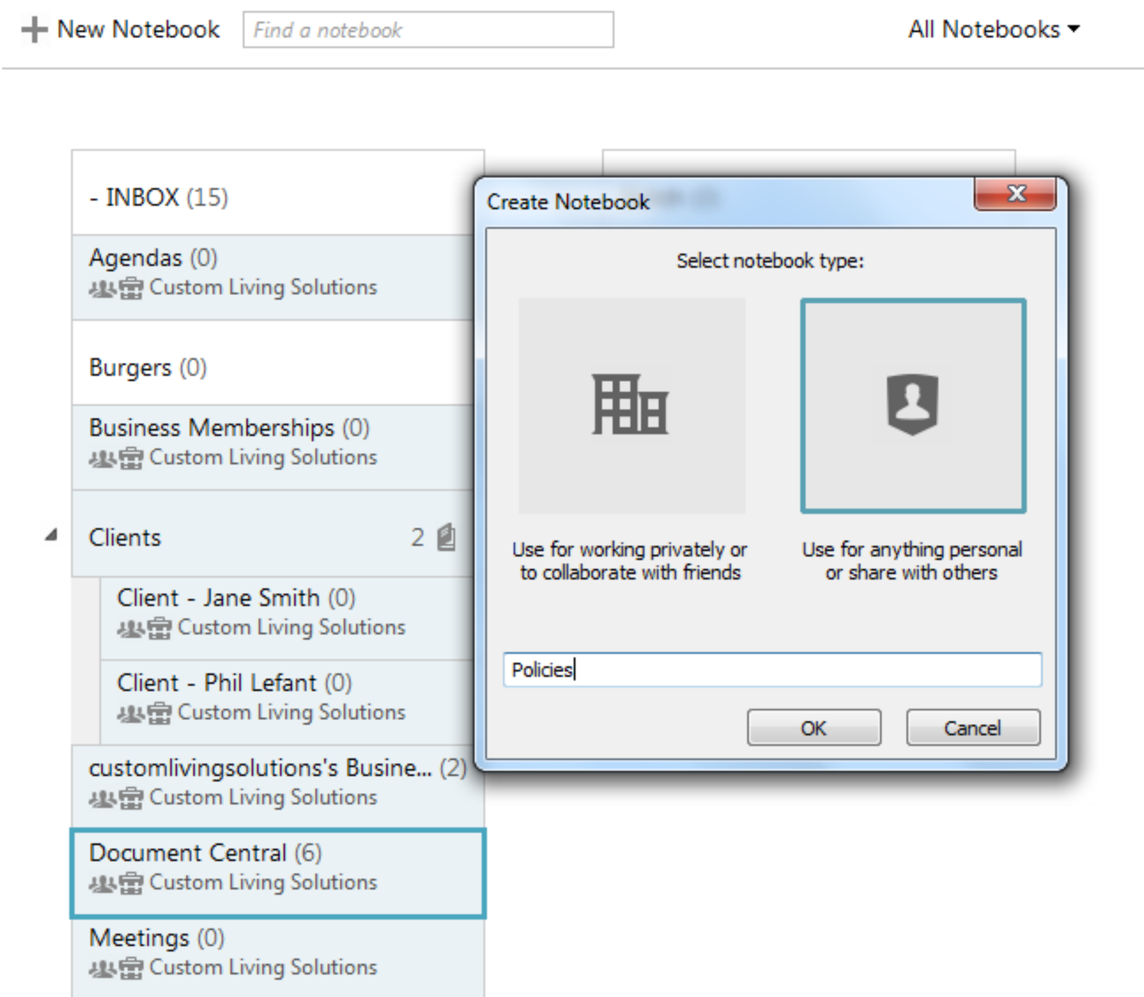
- Payroll
- Employment hours
- Company ethics and standards
- Employee leave or time off requests
- Computer and device use
- Internal grievances or other HR-related issues

As well as external, or client/customer facing polices, including:

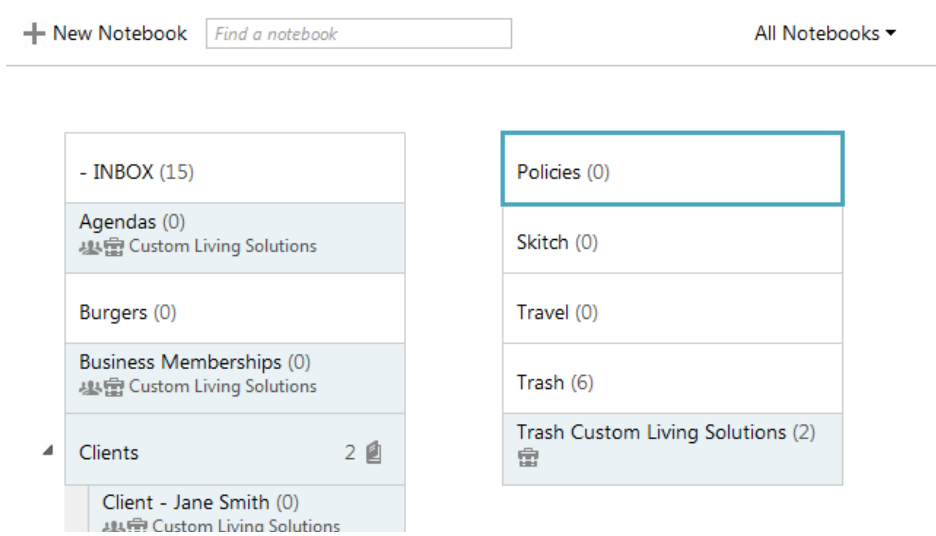
- Handling customer complaints
- Cancellations
- Refunds
- Privacy
- Data security

Again, think of policies as overarching rules that guide behavior. Policies are different from procedures or how-to's - those are job-specific instructions on the steps an employee would do to complete a particular task or job. We'll explore more on those in the chapters that follow.

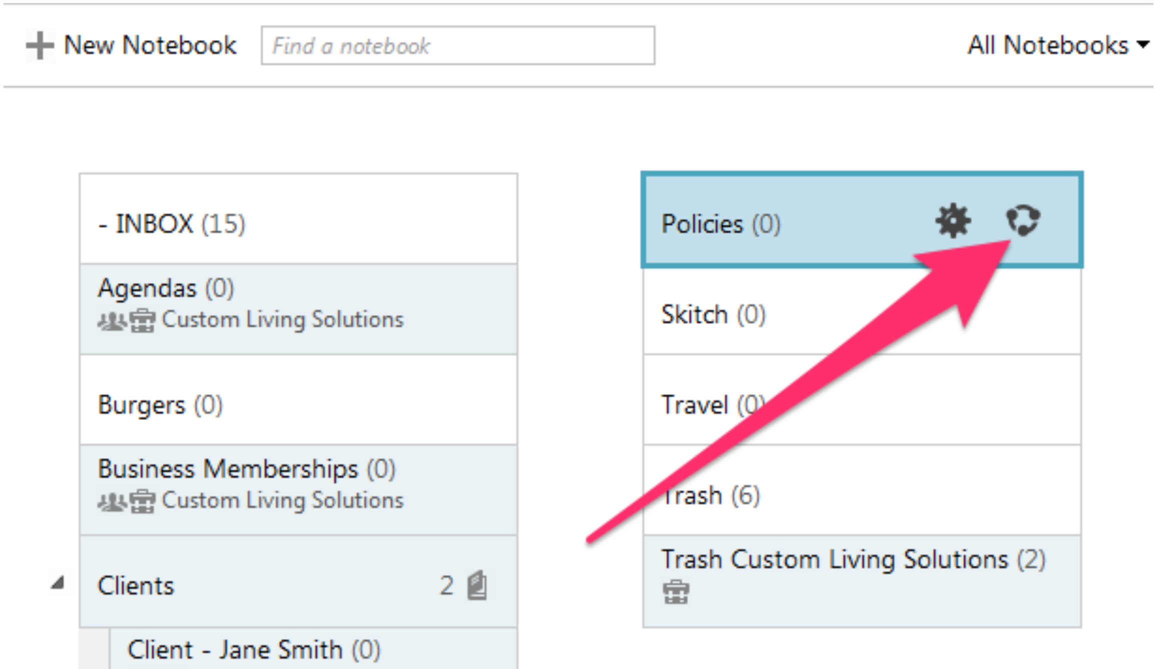
In this example, I'm going to create a new notebook for policies. This is how you could do it if you are using Evernote or Evernote Premium, rather than Evernote Business. First, create a new notebook and call it “Policies.”



Notice that it's white, not grey - that's because it's a personal notebook, not a Business Notebook. On Mac, it will show up as brown instead of grey.

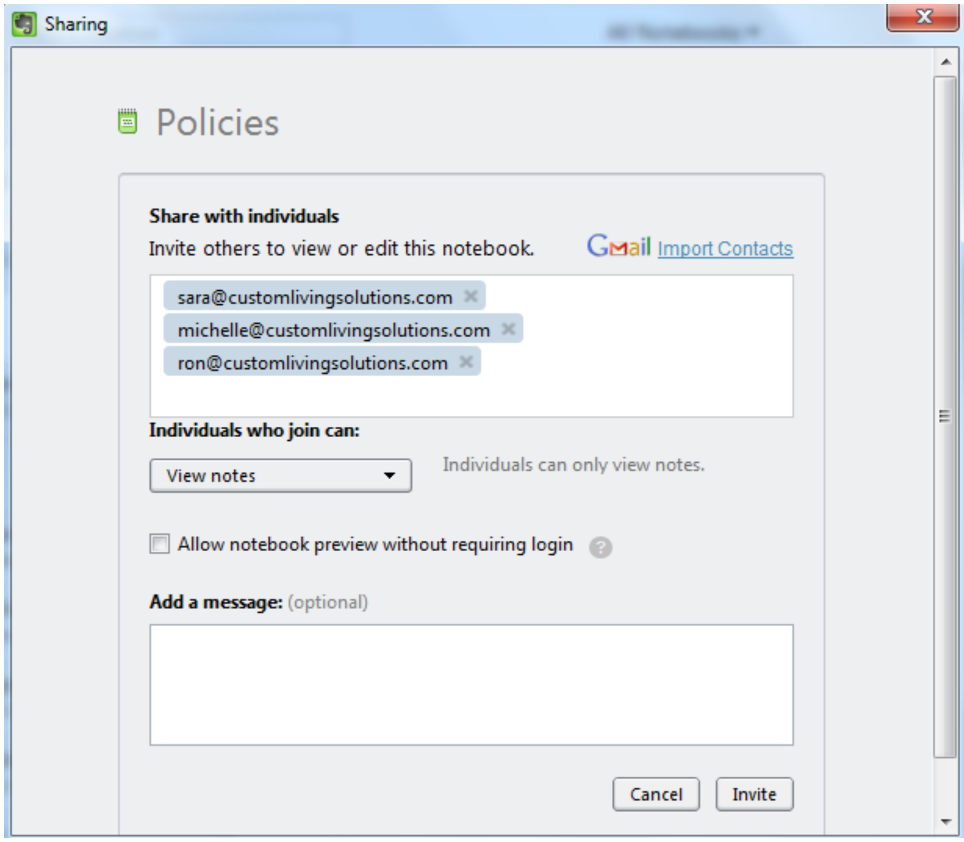


Now that the notebook has been created, I need to share it with my team members. To do that, click on the share icon.

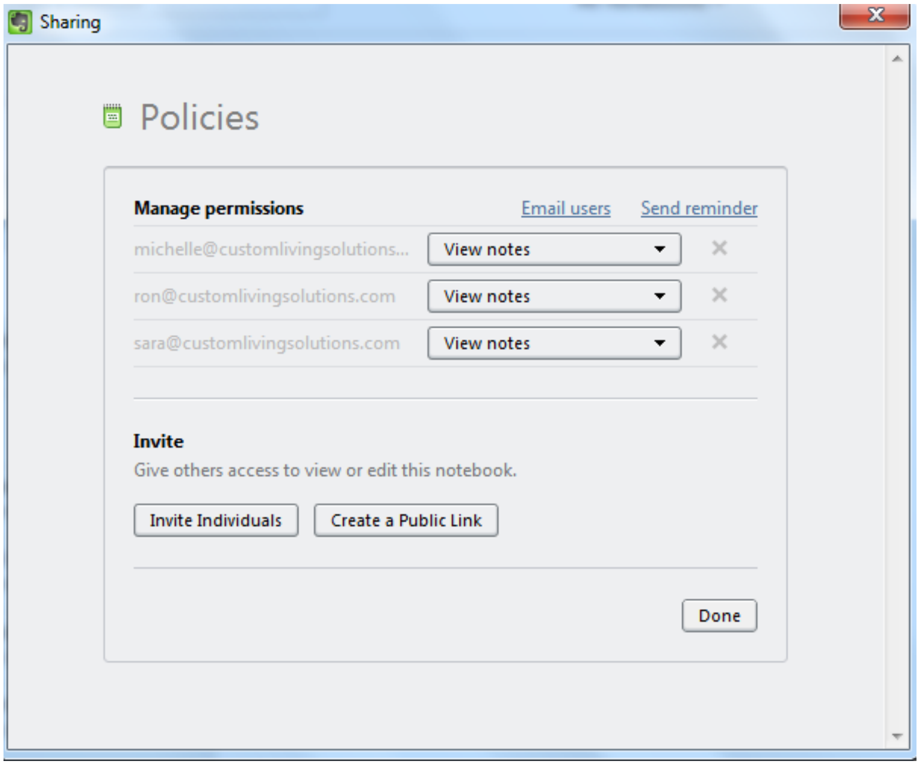


Clicking the share icon brings up the sharing pop-up screen. From here, you can invite individual team members, via their email addresses, to view this notebook (or view and modify, if you so choose - as long as you're using Evernote Premium or Evernote Business).

Note that you can share a notebook even if it doesn't yet have any notes in it, as in this example.



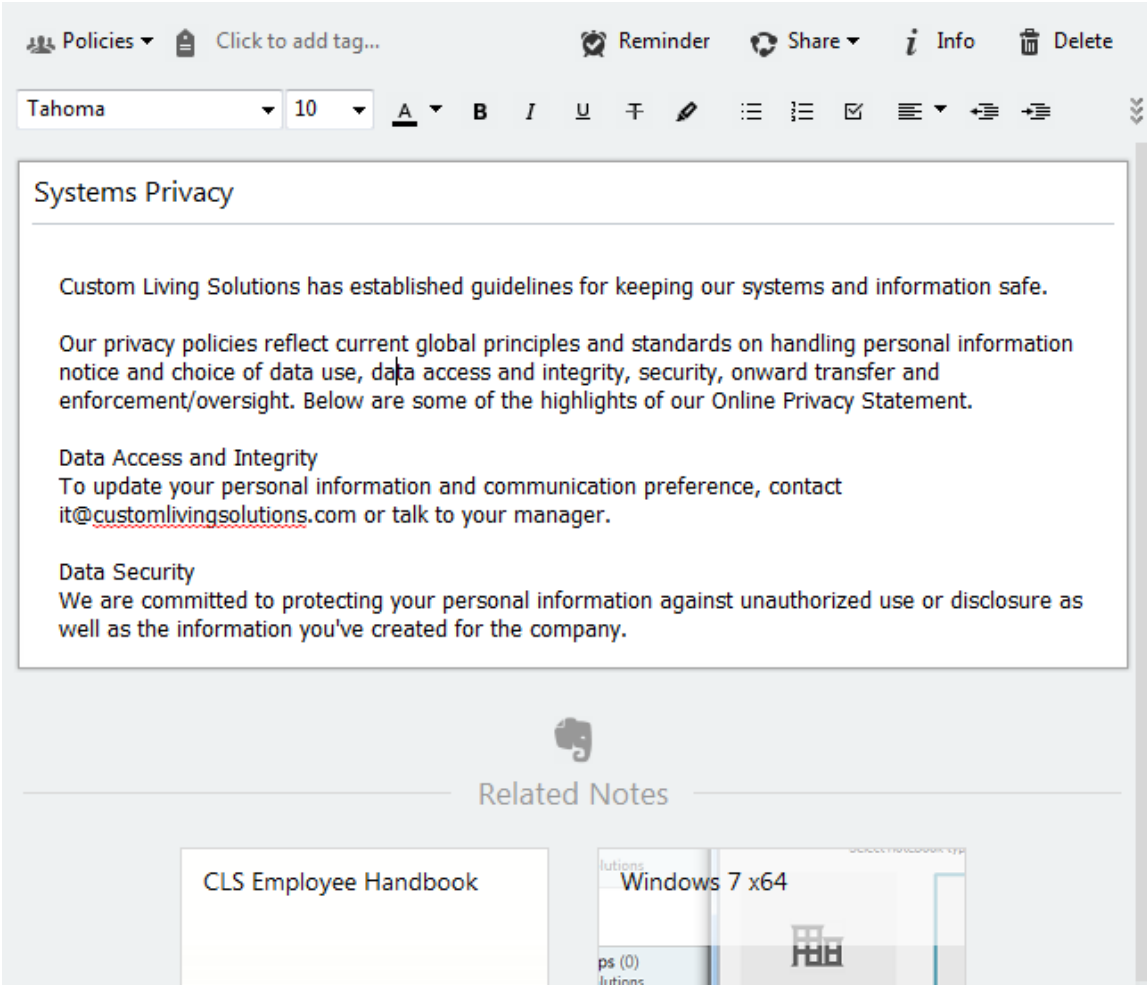
Once a notebook has been shared, you can modify sharing at any time by clicking on the share icon, which lets you manage permissions for people you're sharing with or invite new people.



Creating the notebook for your policies is the first step. Now you need to fill it with your company's policies!

Inside of the Policies notebook, click on the "+New Note" button at the top of the screen. This will create a new, blank note where you can write or paste in a policy. For simplicity's sake, it's best to create one note per policy.

In the example below, I've created a note in my Policies notebook for Systems Privacy. You can add as many new notes as you need for your company's policies.



Your company's policies are internal and sensitive documents, so adjust your sharing to make sure they do not get circulated outside of your company.

Procedures, Checklists and How-To’s

If policies govern the rules for how your business runs, then procedures and checklists are the specific written processes for how to actually deliver what your business offers (your product or service). Unlike policies which are broad in scope, procedures are generally position-specific and relate to how a particular job task is completed.

Written procedures are critical for every business. Why? They help shorten training time, make it easier for other people to take over a role if another team member is unexpectedly ill (or just needs to go away on vacation), and they provide job continuity when a new employee is brought in to take over from one who has moved on. The bigger a business gets, the more important these procedures become.

Even in one-person businesses, procedures are incredibly helpful as they can help a frazzled solopreneur remember how to get their tasks done. All too frequently, we learn how to do something, forget how to do it, and then have to re-learn it the next time the same task needs to be completed. What a waste! Creating written procedures for these tasks eliminates re-learning.

Evernote, both on its own and in combination with some helpful integrated tools, makes the process of documenting your procedures, checklists and how-to's a lot easier. It does take some time to create them - but once you do, you'll wonder how you lived without them.

Before I show you how to create procedures, checklists, and how-to's using Evernote, let's first define our terms:

Procedures are the overarching processes you use to run your business, deliver your product or service - essentially, how your business does what it is that it does. Procedures are typically not step-by-step instructions, but rather an overview of the steps involved. To document the steps involved, a given procedure might have one or more checklists and/or how-to's.

Checklists are a way to document the steps within a procedure. Checklists typically are best for documenting non-screen-based workflow - so personal interactions, sales processes, physical tasks, etc., can work well with a checklist. As an added bonus, people generally seem to like checklists - the metaphor is easy for many to understand, and lots of people love checking things off a list!

How-to's document specific steps within a screen-based workflow. So basically, any tasks that are computer-based, highly technical in nature, or just involve many steps can be well-served by documenting them with a how-to. Evernote's Skitch product and the integrated tool Clarify are great helper applications that let you document screen-based interaction and bring those documents into Evernote, where they can be shared with your team.

For example…

A *procedure* would be creating and sending an email newsletter. The steps in that procedure might be:

- Create newsletter copy (or get from copywriter)
- Gather images
- Gather links
- Put all copy, images and links into newsletter format
- Send a test to check for errors
- Segment email list
- Queue newsletter to send to segmented list
- Send to list
- Review bounces and other issues
- Review stats
- Note any changes that should be made for next newsletter

Note that none of these steps explains in detail how to actually do it - the procedure is an overview of what's involved.

Checklists help document some of the steps in the procedure. For instance, a checklist could be created for the copywriter that looks something like this:

Write newsletter article on XYZ topic
Max length should be 350 words
Save as plain text format
Send to boss@mycompany.com for review
If needed, make suggested edits and send completed version (in plain text format) to boss@company.com

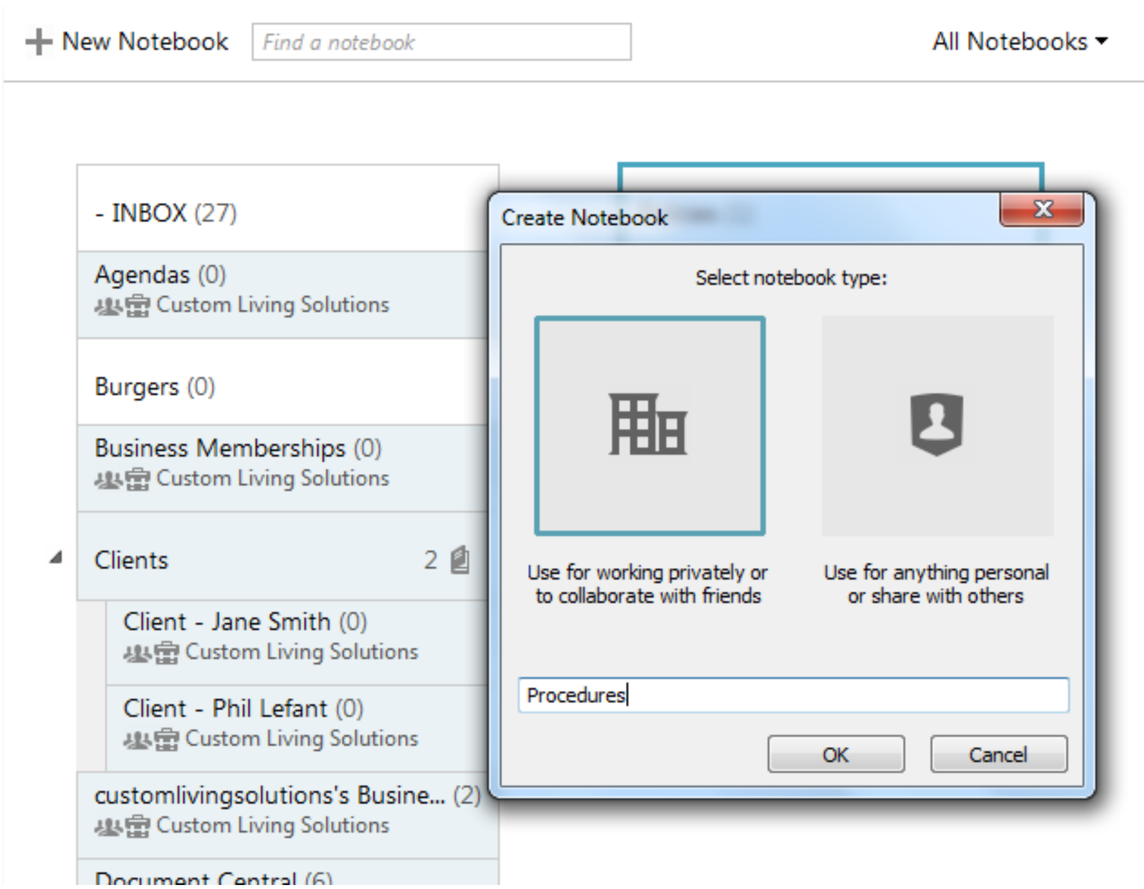
How-to's are ideal for documenting how to do the more technical elements of the newsletter task. For instance, a detailed how-to, including written instructions and screenshots, would be very helpful for segmenting an email list, which is typically a number of steps, all of which take place on the computer screen.

Procedures themselves don't generally change that much over time - but the checklists within them, and moreso, the how-to's, tend to change with some frequency. Especially since how-to's deal with computer-based interaction, they usually need to be updated as tools or apps change.

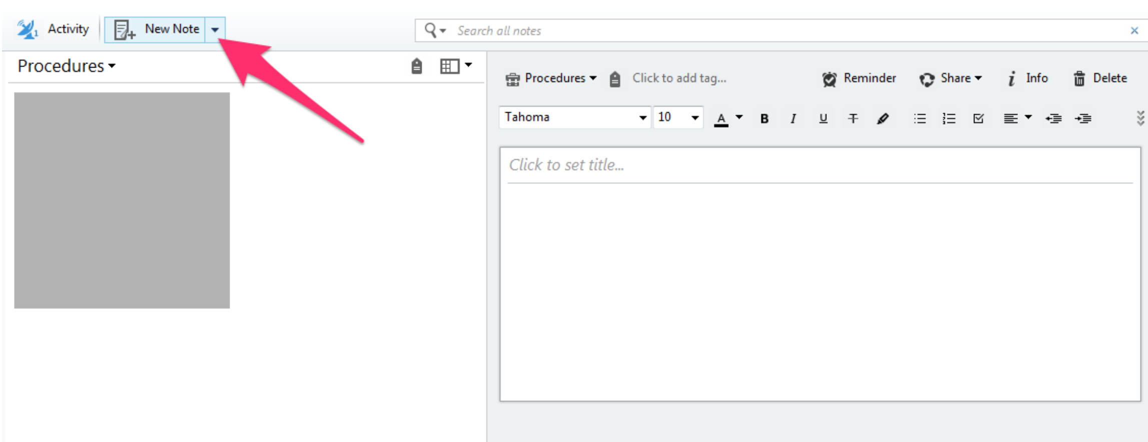
Using the example of creating and sending a newsletter, I'll show you how to use Evernote to document and share a set of procedures, checklists and how-to's.

First, create a new notebook to store your procedures. Let's make this one a

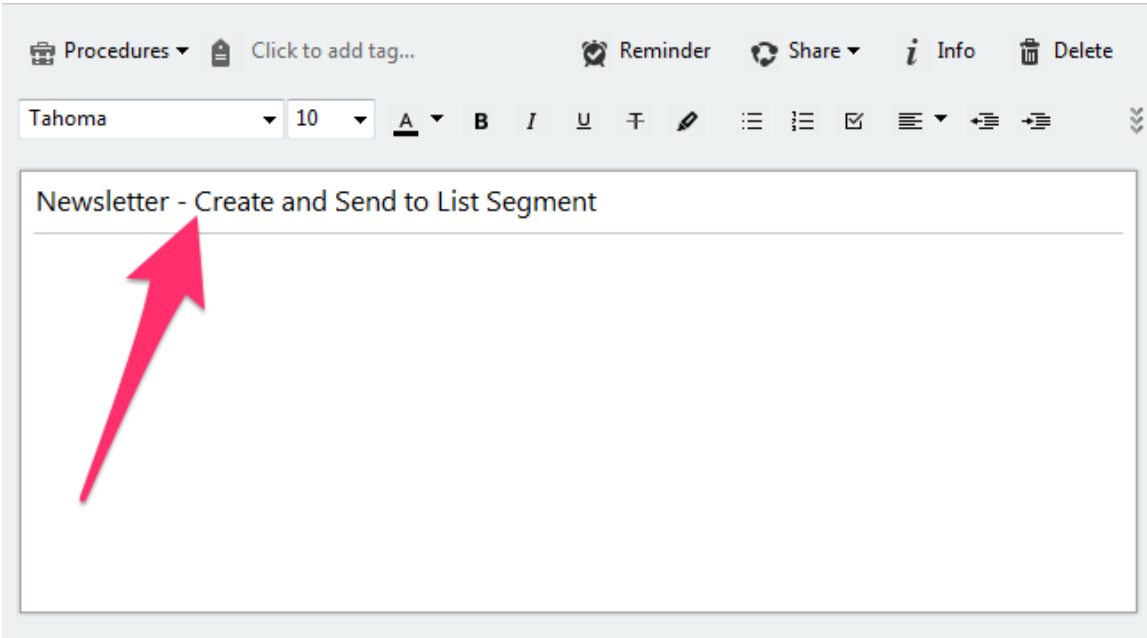
Business Notebook, and call it “Procedures.”



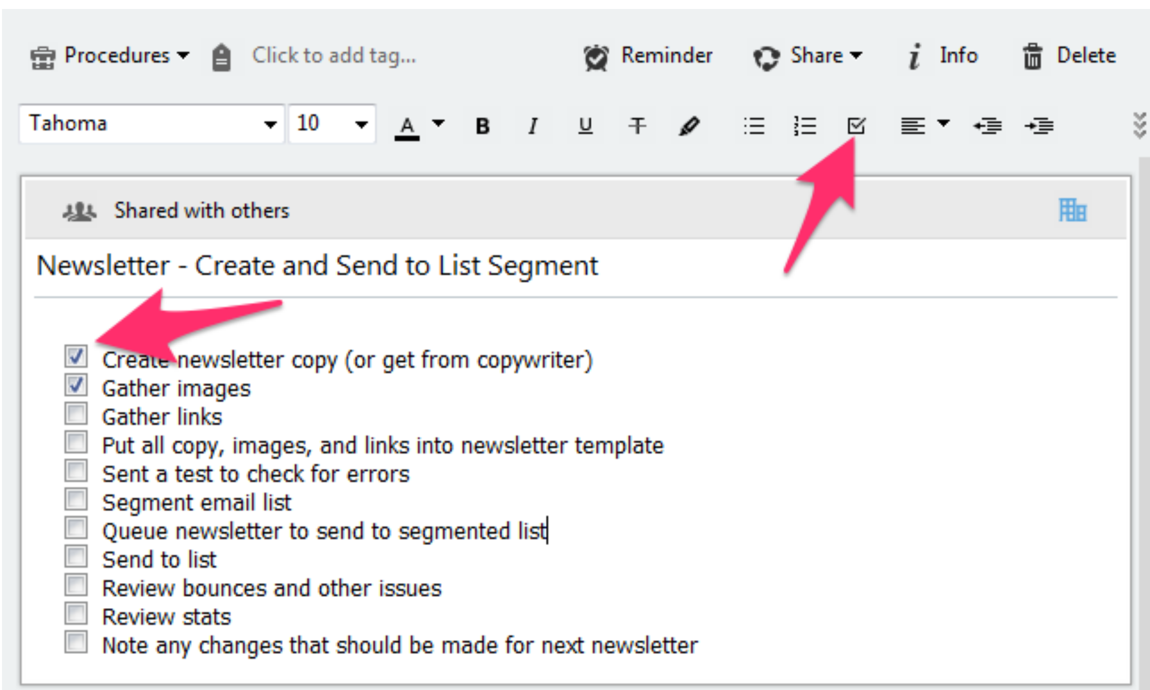
Now that we have a home for our procedures, it's time to create one. Open the “Procedures” notebook, and click on "+New Note" to add a blank note.



Let's title this one "Newsletter - Create and Send to List Segment.”

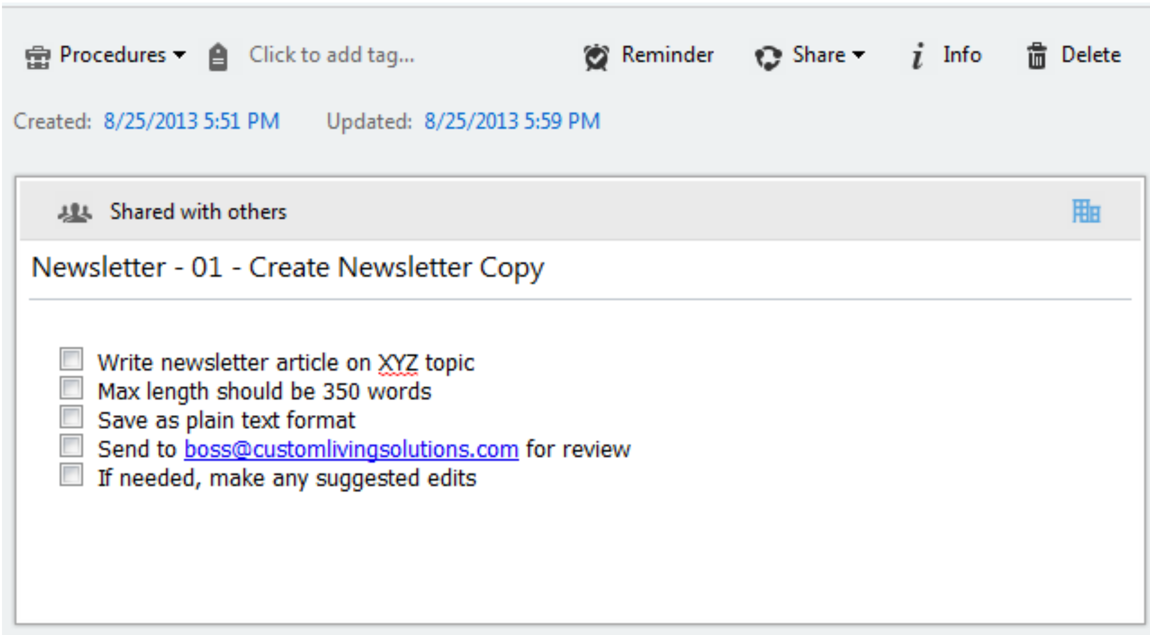


Then add in all the steps that might go into sending a newsletter out to the list. You can use the checkboxes feature to add checkboxes to the note to indicate whether each step has been completed.

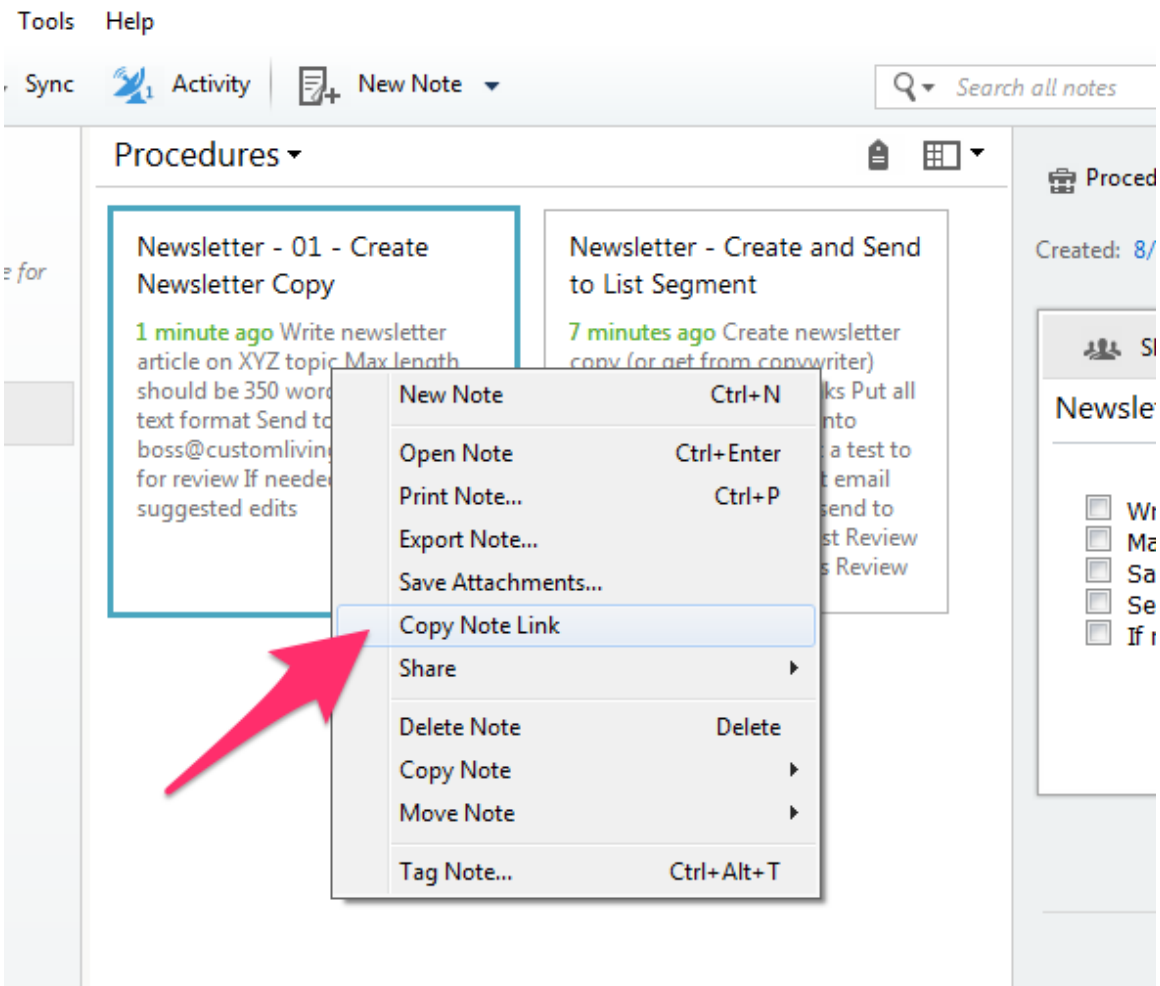


Ok, we've got the basic steps listed, but that's just the start. Let's try creating a checklist for one of the steps in the process. Create a new note, and name it "Newsletter - 01 - Create Newsletter Copy." Naming it in this way corresponds to its position in the procedure list, and it will help keep it in numerical order once more notes get added into this notebook.

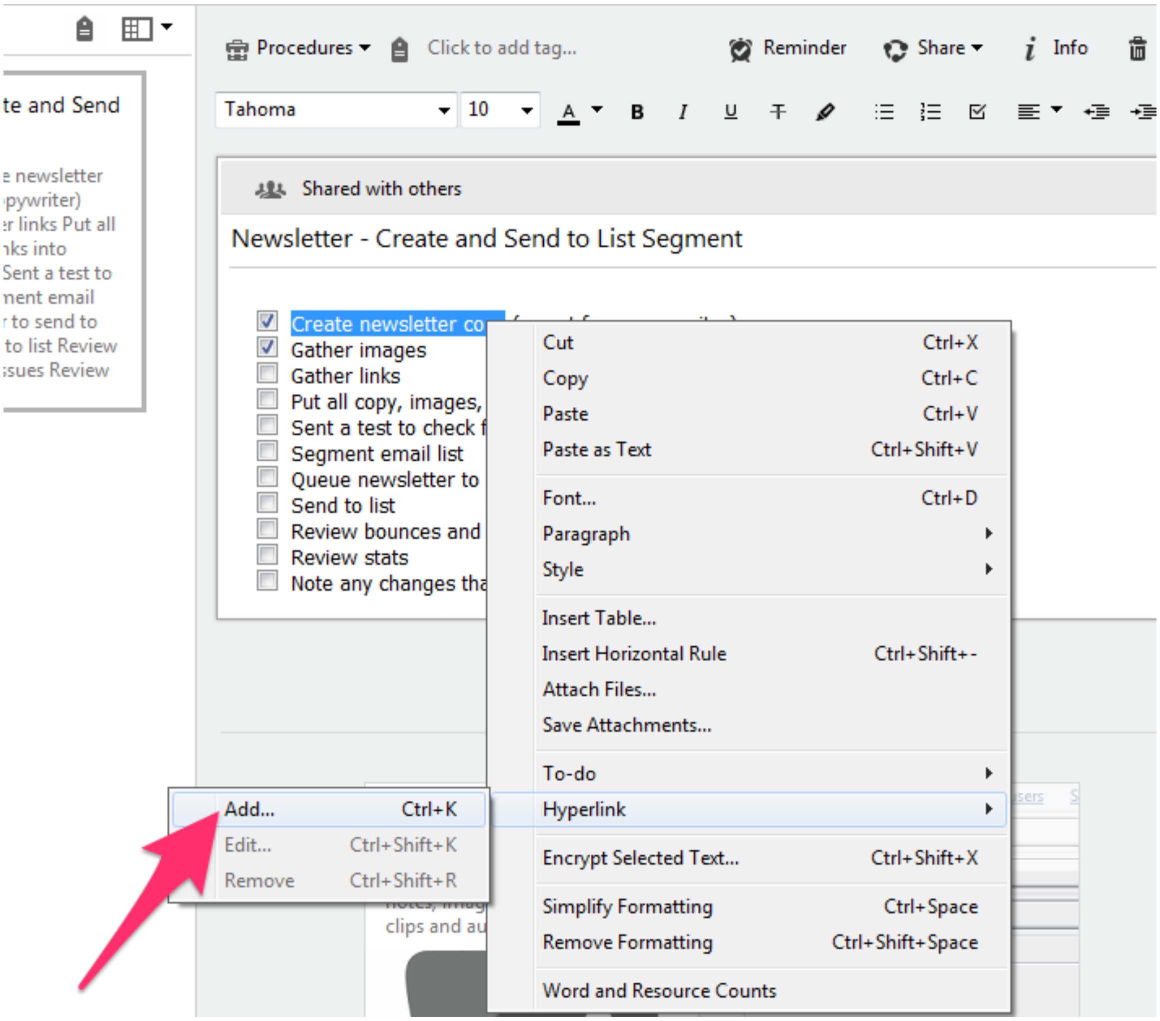
With the note created, now you can add in the specific steps that the responsible employee or copywriter would need to take to complete this task. Again, by using the checkbox tool in the formatting toolbar, you can add in a checkbox for each step.



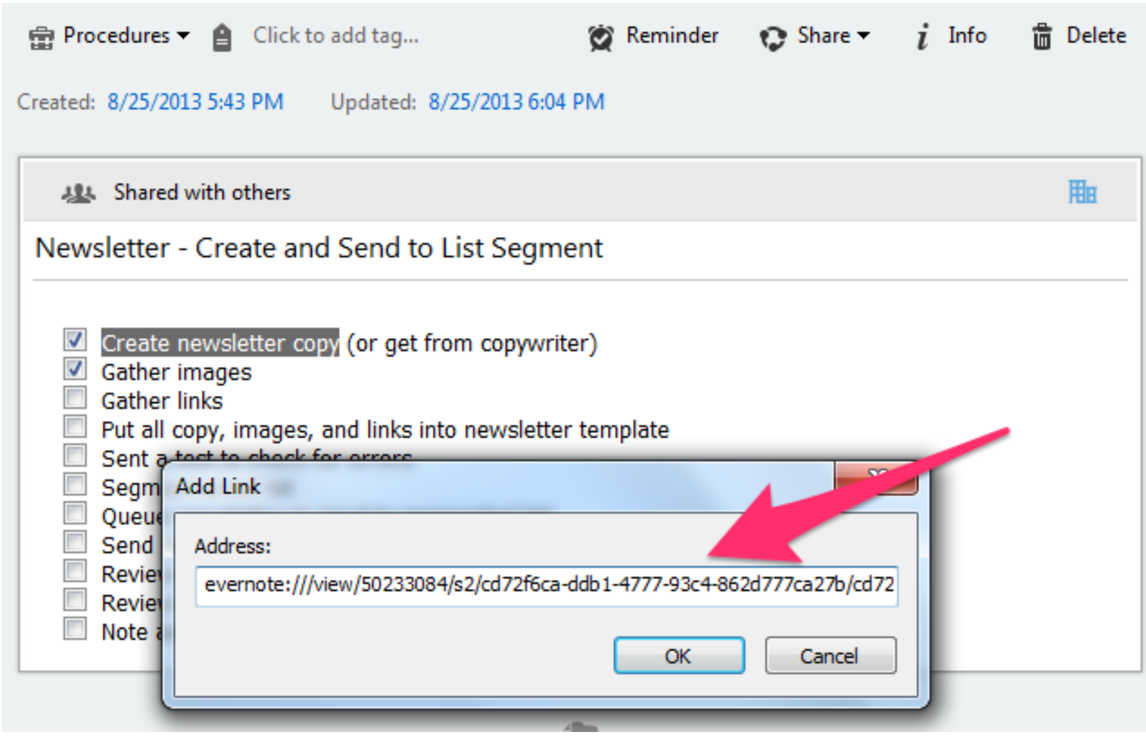
Now, let's link this checklist to it's corresponding step in the procedure note we created earlier. Right-click or control-click on the note in the note list, and select "Copy Note Link." This will create an internal hyperlink within Evernote, and will copy it to your computer's clipboard.



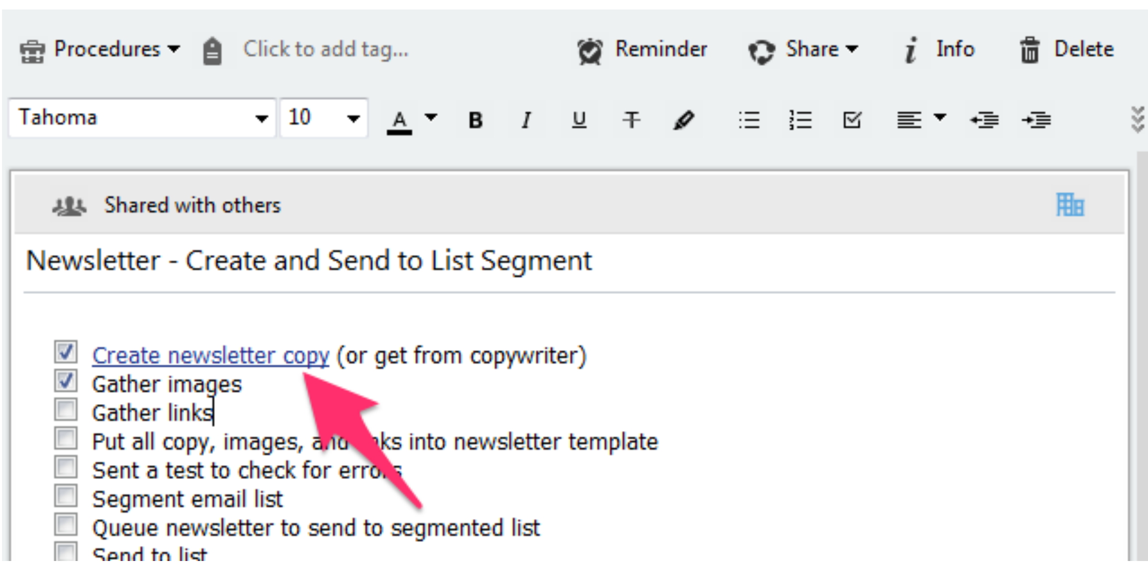
Now, go back to the note that lists the overall procedure - in this case, the note that says "Newsletter - Create and Send to List Segment." Select the text from the first item in the list, "Create newsletter copy," and then right-click or control-click. In the pop-up menu, scroll down to "Link," then "Add."



In the pop-up window, click command-V or control-V to paste in the link that has been copied to your computer's clipboard, then click "Ok."



Now, you'll see that a link has been created on the text that you'd just selected. When you click on the link, you'll jump directly to the note that contains the steps to create newsletter copy.



When your procedures have a lot of steps, using Note Links can save you lots of hunting for specific notes!

Checklists work well for tasks don't involve much (or any) screen-based interaction. When words work well, use them! But there will likely be many other steps that need further explanation - and sometimes that explanation is best in visual format.

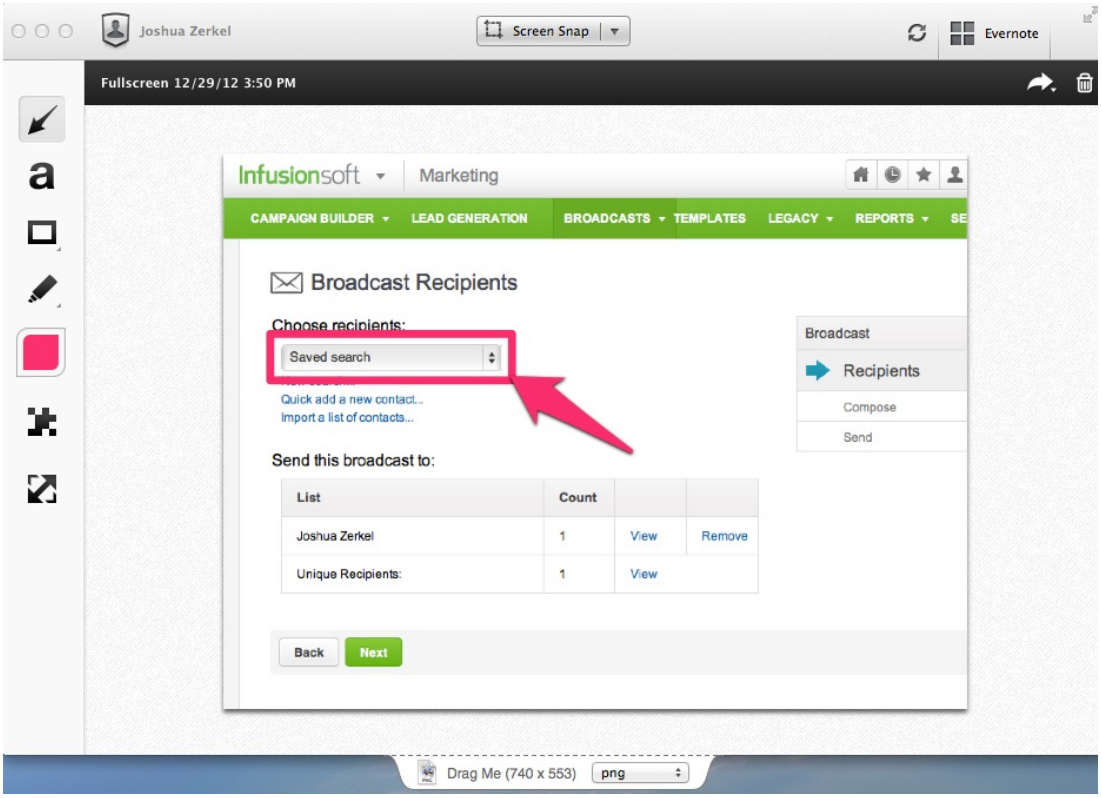
Trying to explain screen-based workflow with words is often very challenging - "click in the upper-right of the screen" can mean one thing to the person who wrote it, and something else entirely to the person reading it ("How far in the upper-right should I click? On which window? Should I click in the upper-right corner?"). To avoid confusion and to make everyone's jobs easier, you'll want to use screen capture tools to eliminate uncertainty and to ensure steps are clear.

On its own, Evernote doesn't provide a way to take a screen capture and then annotate it. There are two tools that work with Evernote that make this job easy - Skitch and Clarify.

Skitch was a standalone product that was purchased by Evernote in 2011 and has since been rolled into the Evernote family of products. It integrates directly with Evernote, and lets you capture a screen (or a portion of it), annotate it with text, arrows, and shapes, and then share it with others or store it inside of Evernote.

Skitch is great for annotating or documenting one screen at a time, so if you have a simple screen-based workflow, such as "click this button to log in" or "select this item from a drop-down menu," Skitch will work nicely. Skitch lets you draw arrows, shapes, and text to highlight specific elements of a screen capture.

Here's an example of me using Skitch to highlight where to click in my email management tool to select a mailing list:

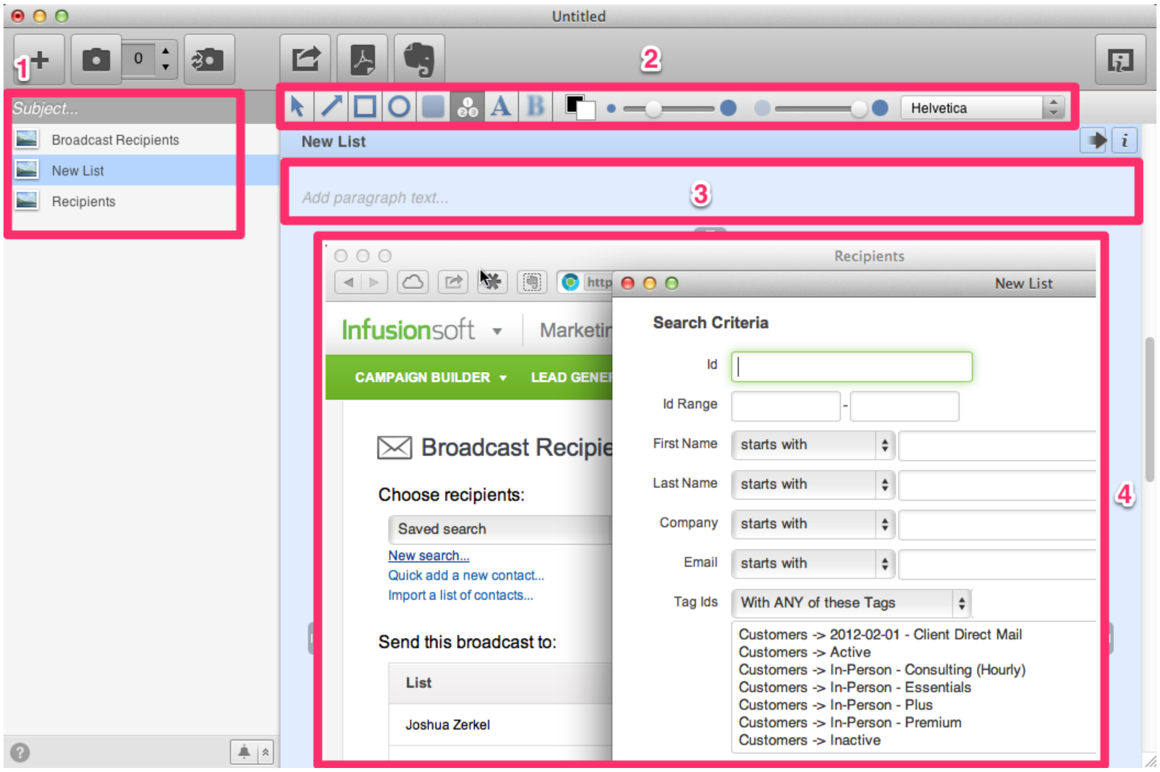


If, when creating a how-to, you have only one step that you want to highlight, Skitch can help you do that. Once you've highlighted the screen that you want to add into your how-to, you can simply drag it directly into an Evernote note. Once the image is in Evernote, you can continue to add descriptive text to further explain the how-to.

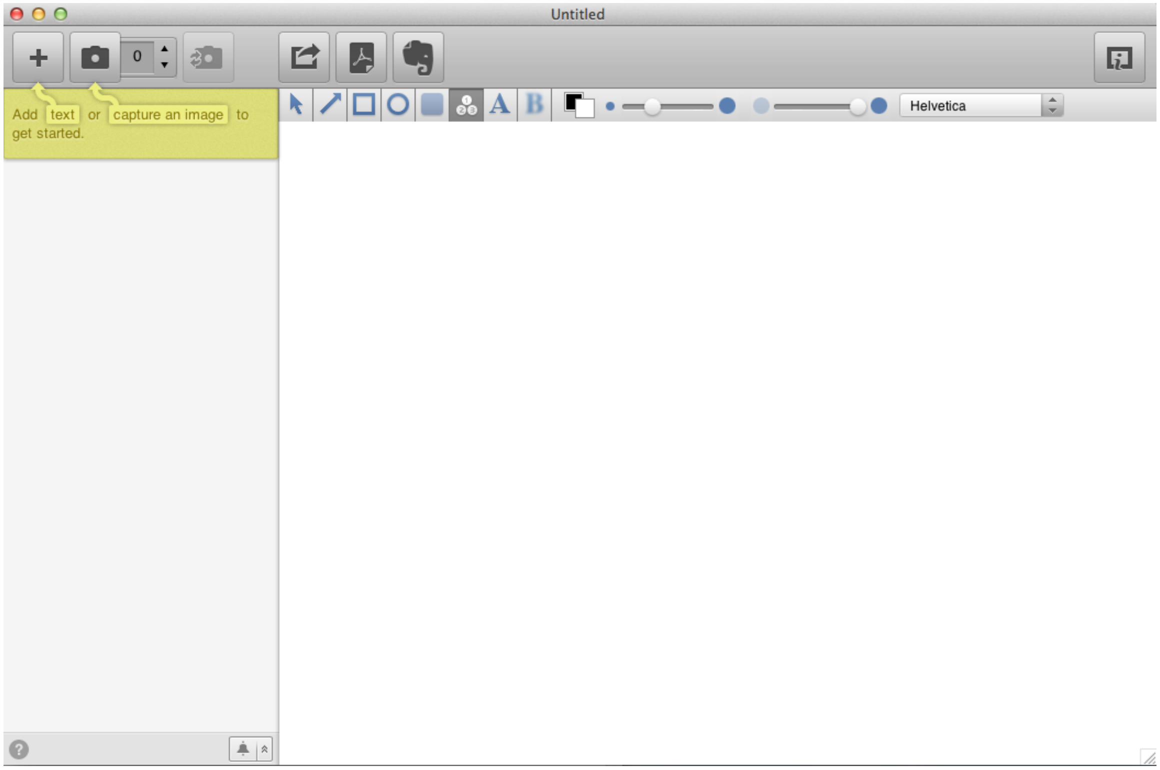
You'll likely also have more complex screen-based workflows (for instance, "segment email list" is actually quite a number of steps), and Clarify will make the process of documenting those steps a lot easier. Clarify is a third-party tool that integrates with Evernote. It works similarly to Skitch in that it lets you capture a screen and annotate it, but instead of focusing on a single step, Clarify is designed to capture and annotate a series of steps.

In our example of creating a newsletter and sending it to a segment of a mailing list, there are many steps that one has to complete. For this reason, it's much easier to document the steps using Clarify than it would be to do it using Skitch, and then import them into Evernote once complete. Let's look at how you could document step 6 in the procedure, segment email list.

Each time I capture a screen in Clarify, it becomes a step (1). I can edit each step individually by marking up the image that I've captured (4) using the annotation tools (2), such as drawing arrows, boxes or shapes, adding numbering, etc. I can also add descriptive text for each step in the built-in text area (3).

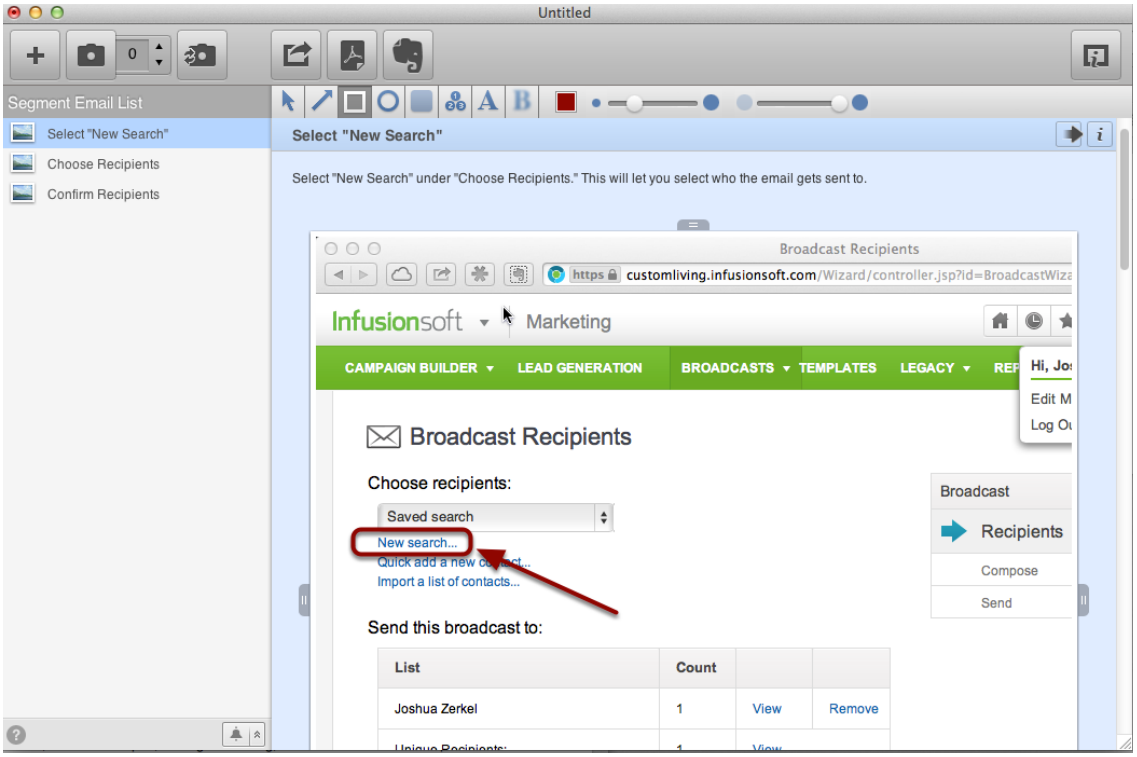


Let's start documenting our first workflow using Clarify. First, open the mailing list tool, and then open Clarify. You'll see a blank Clarify document that looks like this:

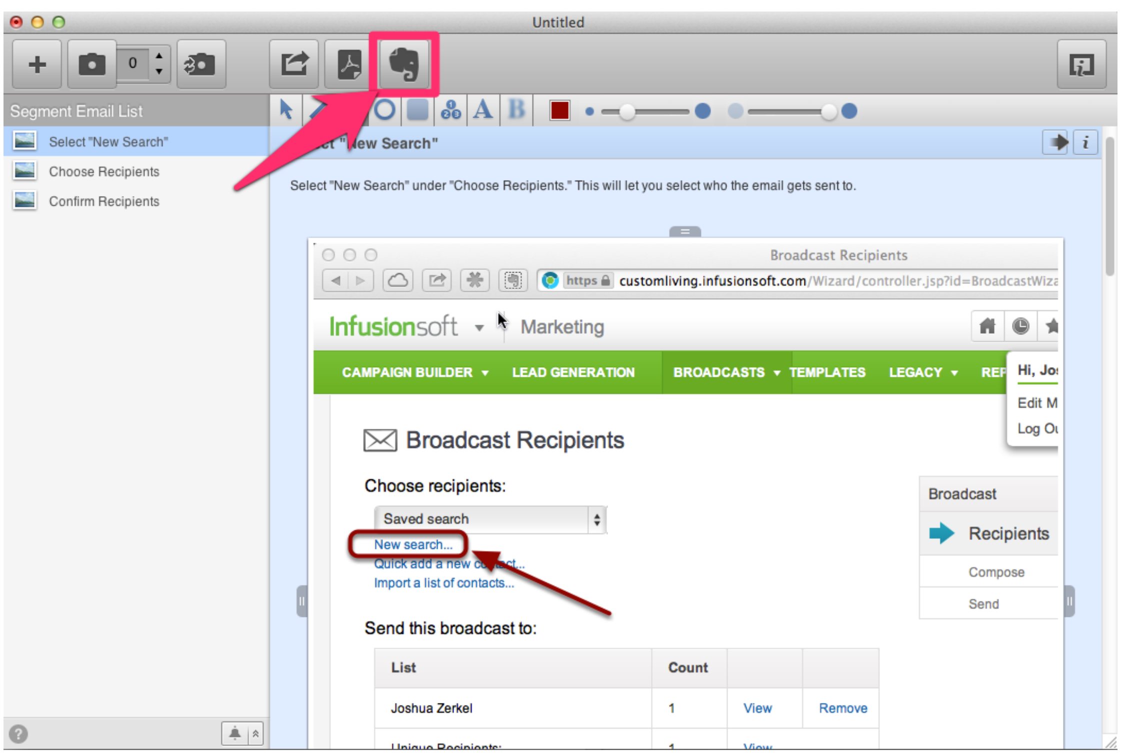


Now, let's capture the various steps that are part of the process of segmenting an email list. In this case, I'll switch back to my email management tool, and for each time I am going to click the mouse, drop down a menu, or move to another screen, I'll use Clarify to take a screen capture.

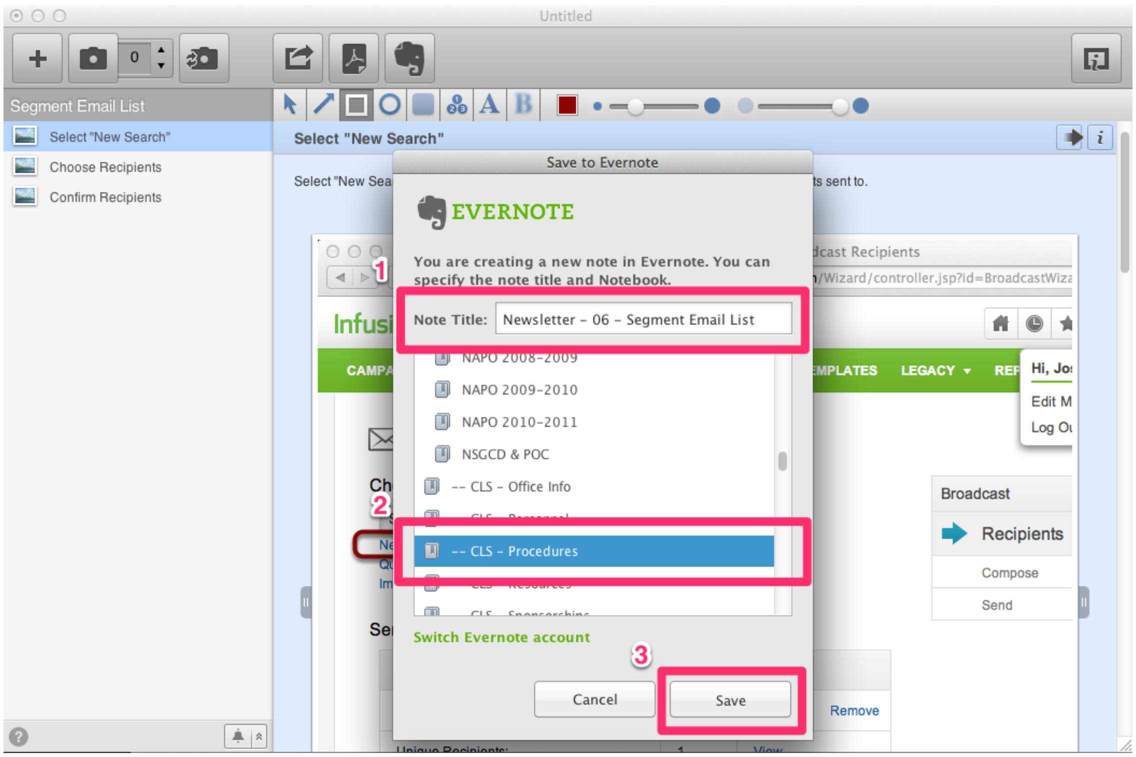
In the example below, I've gone through and edited each step, adding highlighting and descriptive text to make each step clear.



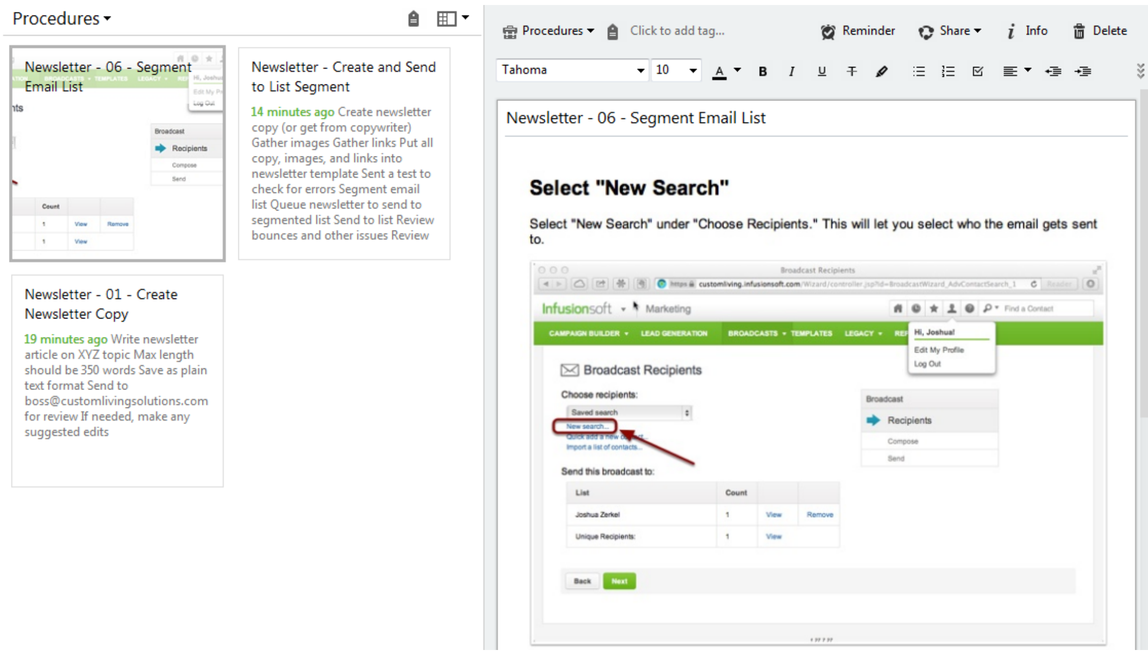
Now we need to get this Clarify document into Evernote so that it can be part of our procedures notebook. Clarify lets you export directly to Evernote, streamlining this process. Just click the Evernote button at the top of the screen to get started.



A pop-up window will ask you what you'd like to title the note that will be created from your Clarify document (1), as well as what notebook you'd like to put it in (2). In this case, I'll call this "Newsletter - 06 - Segment Email List" and I'll put it in the Procedures notebook. Clicking "Save" begins the export (3).



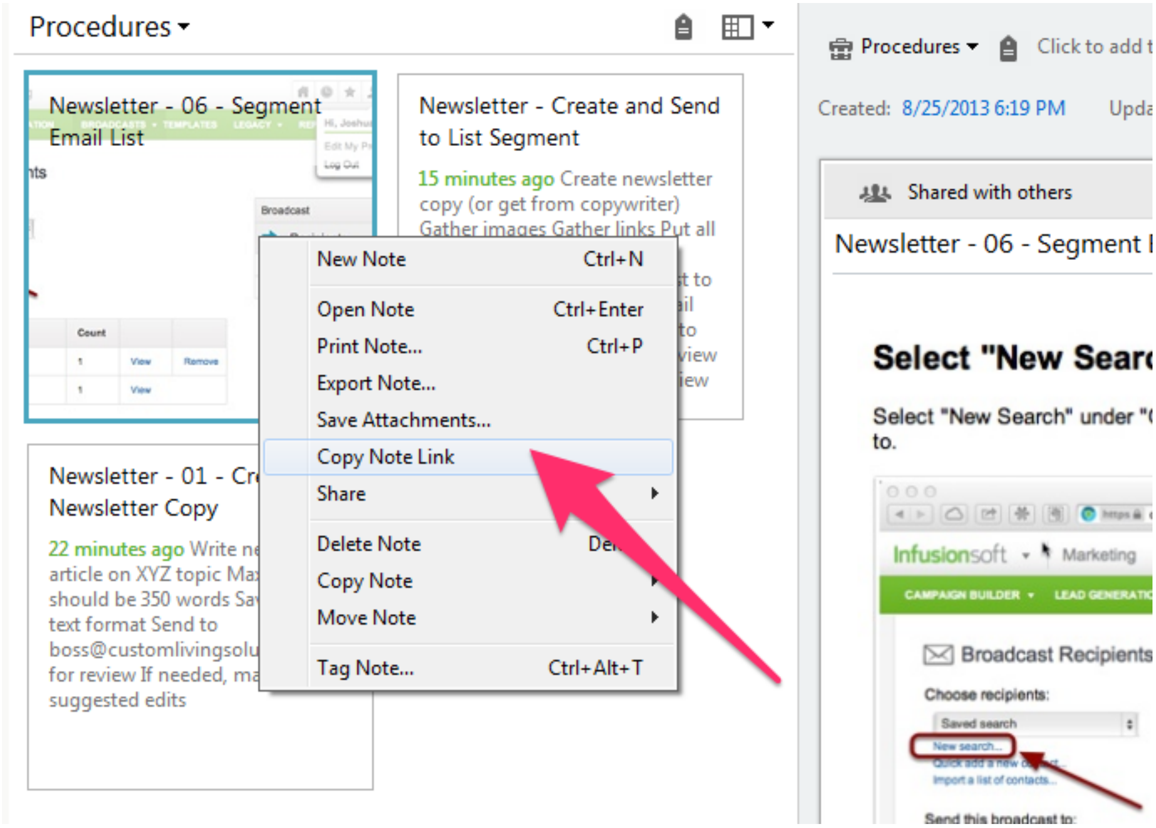
Now the Clarify document is reborn as an Evernote note, complete with all images, annotations, and text explanations. You can continue to modify the text directly in Evernote.



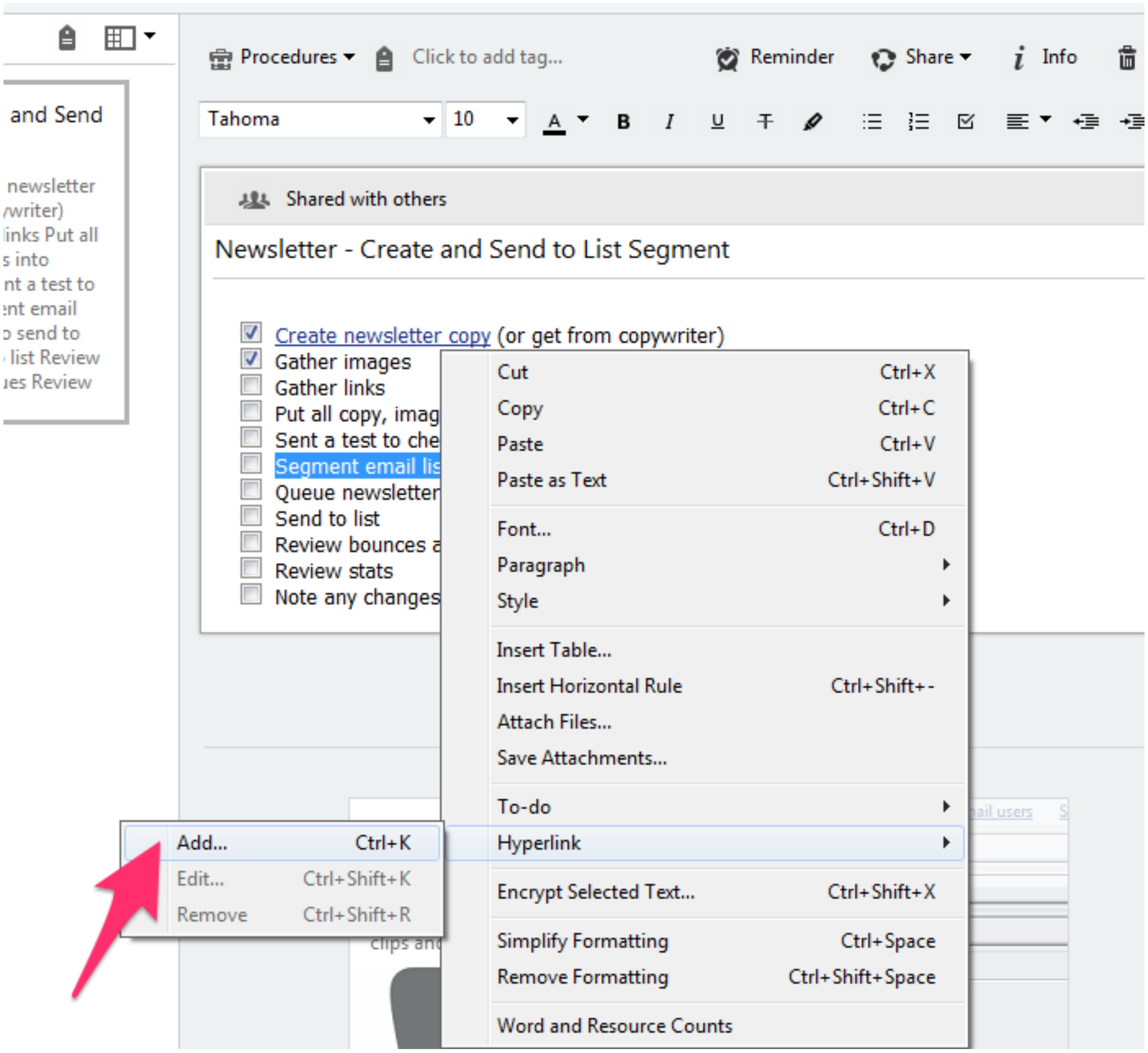
If you need to ever edit the original Clarify document (for instance, if the workflow changes or step gets added), the original Clarify document is attached to the note. Just double-click it to open it up in Clarify and continue editing.

Of course, we'll want to repeat the steps we used previously to link this note to our master procedure list - the "Newsletter - Create and Send to List Segment" note.

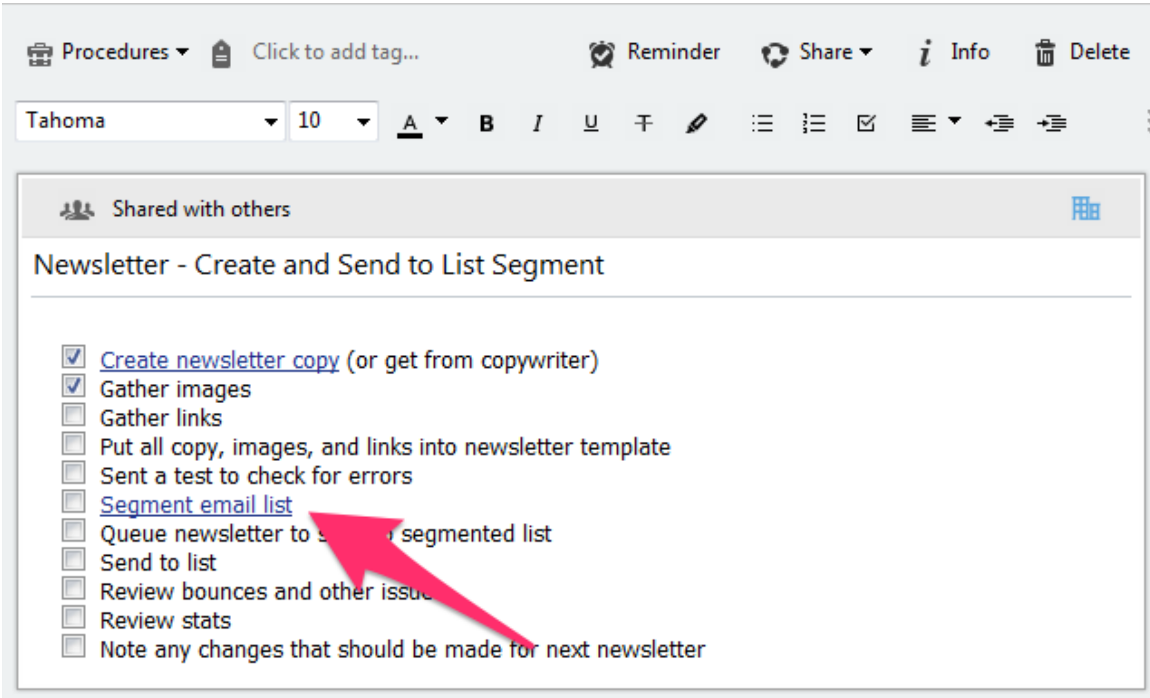
First, we'll copy the note link:



Then we'll paste the link to the master note:



Our Note Link will be created, allowing the person using this procedure to quickly and easily move from step to step.



Of course, one of the benefits of putting all of this documentation in Evernote is that it's easy to share it with the people responsible for completing the various tasks you've been so diligently documenting. You may choose to have one master procedures notebook, or perhaps you create separate notebooks by job function, department, or type of tasks - it's really up to you. Follow the steps outlined in *Chapter 7 - Notebooks - Personal, Shared, and Business*, if you need a refresher on how to share notebooks with your team.

Every eBook, Easily Accessible

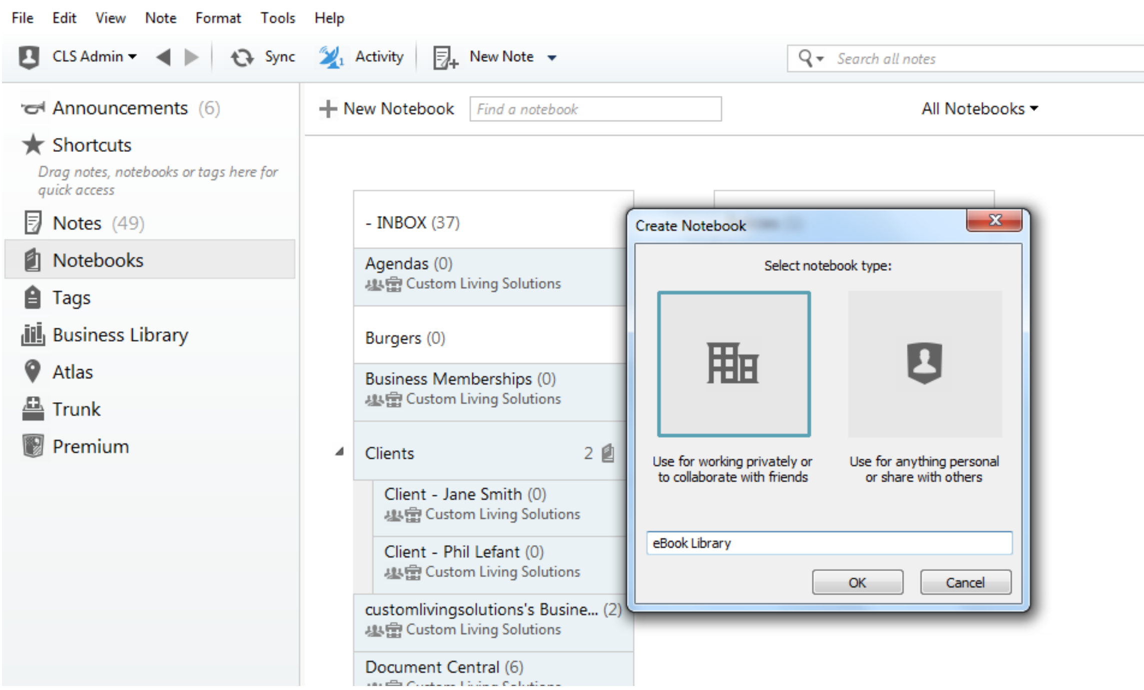
There's an endless amount of information available online - and some if it is actually useful! If you're like many people in today's business environment, chances are you've downloaded a number of eBooks, white papers, and special reports. These eBooks and reports can be very helpful and are available on a wide variety of topics from an equally wide array of sources - there's no shortage. Certainly, I've downloaded my fair share of these bits of information, and it wasn't until I organized them in Evernote that I found them truly useful.

You can download dozens or reports or eBooks on social media, marketing, running a business, or client service - but if you can't find them when you're actually ready to act on a topic, then you've wasted your time downloading them in the first place. Information has to be quickly and easily accessible in order to make use of it - and digging through a cluttered and disorganized downloads folder just isn't effective.

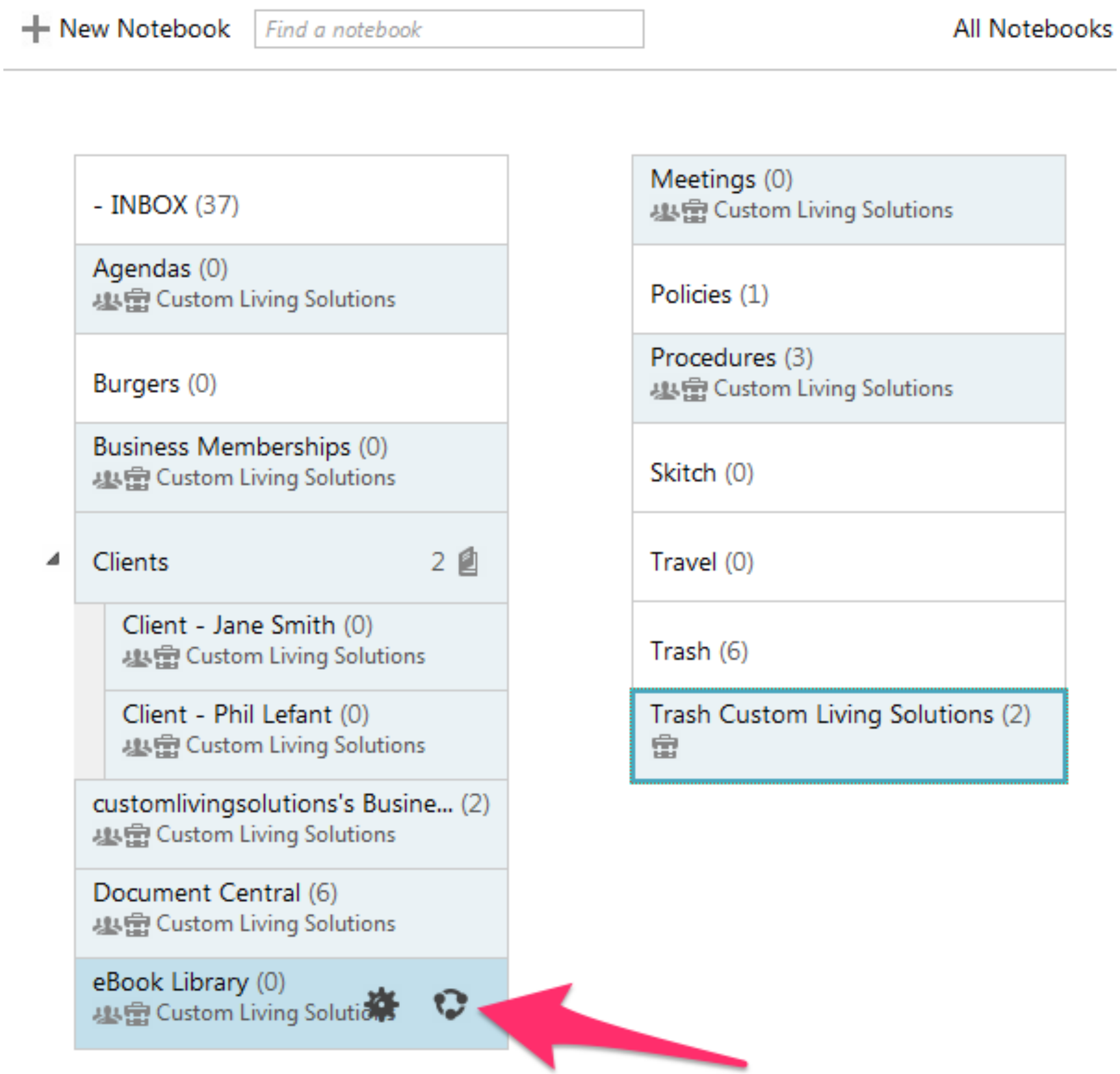
Evernote to the rescue! Evernote is a great place to create a library for your eBooks, because you can organize them any way you want to, then you can share them with your entire company. Perhaps you're not looking for information on the latest social media trends, but one of your colleges is - and there's an eBook in the library ready to serve them. By centralizing this information, you make it accessible for everyone, right when they need it.

Before you begin creating your eBook library, make sure you are working within the copyright rules of anything you've downloaded - you don't want to run afoul of any copyright laws or restrictions.

Begin by creating a new notebook called "eBook Library."

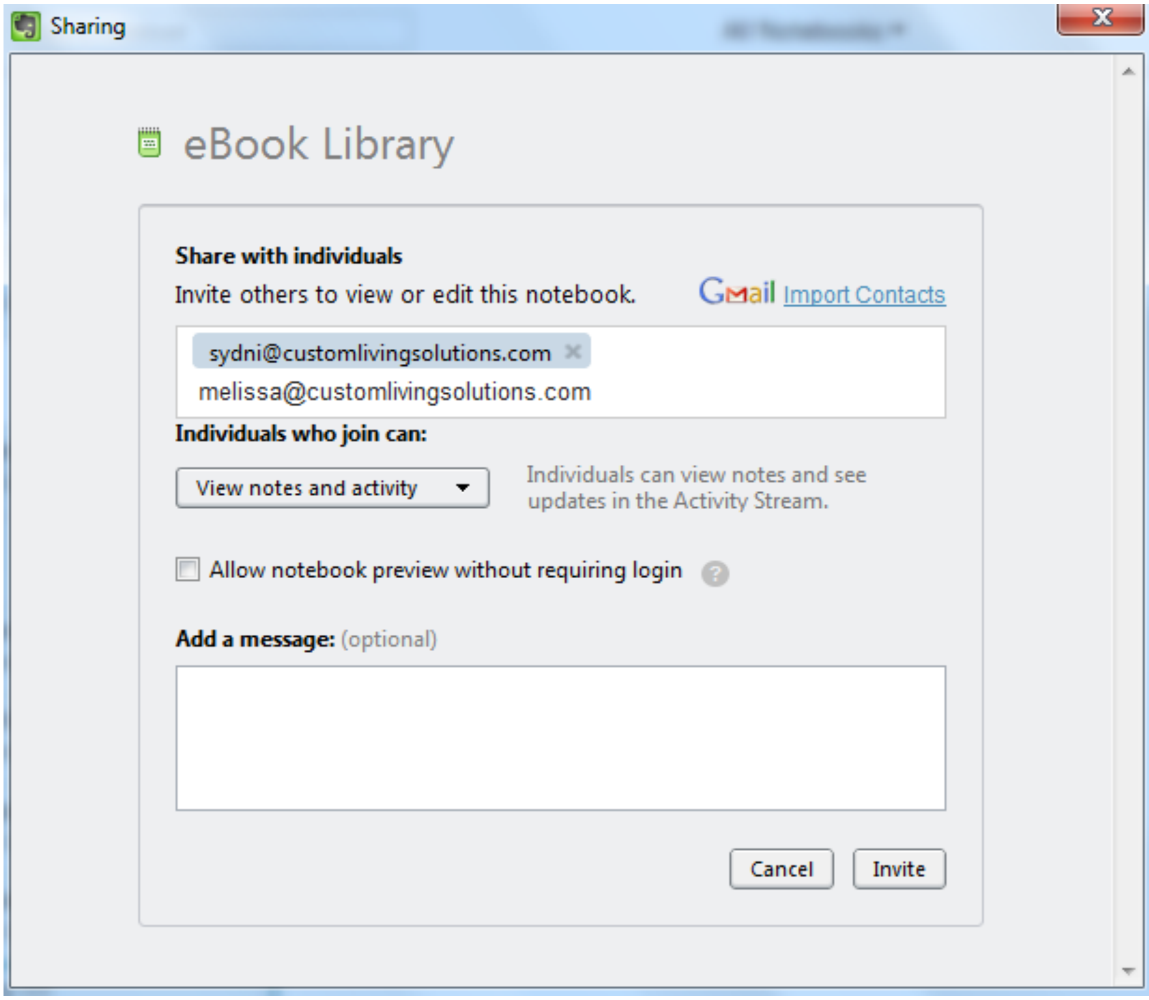


Since this is a notebook full of documents we'll be sharing with our team, we need to make it available to other people. Click the share icon.



This will bring up the sharing window. Let's invite specific team members who we'd like to give access to the eBook Library.

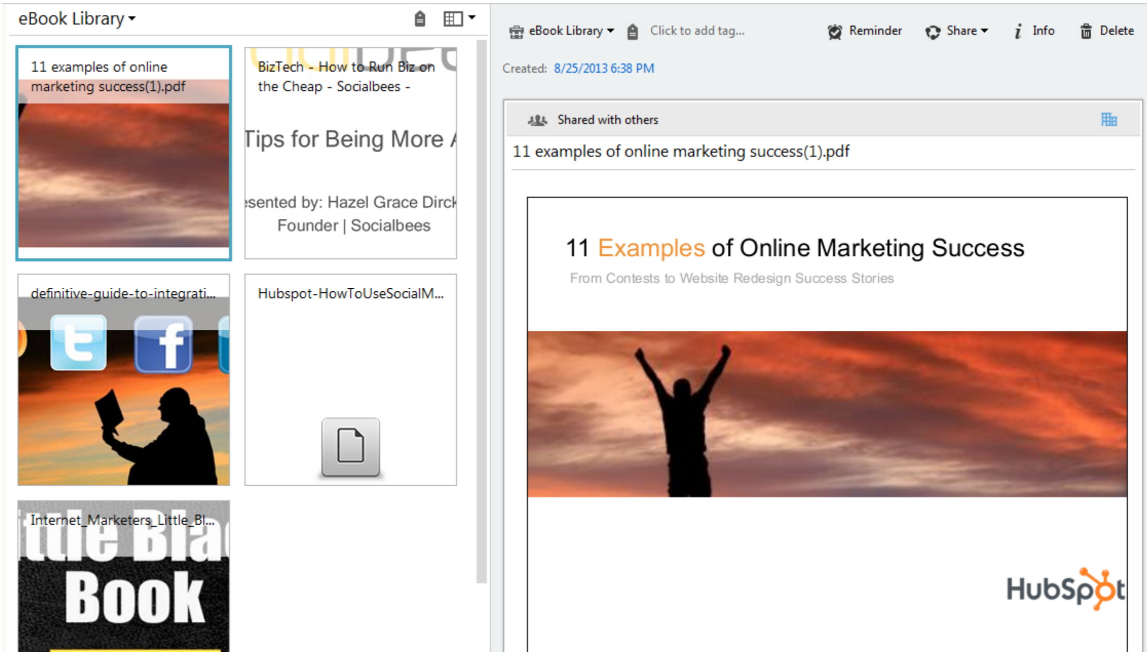
Set the permissions (1) for whether your team members can simply view, or view and edit, the notes that you put into this notebook. Since we really just want people to be able to read the documents we're putting into the eBook Library, we'll set the permissions to view only.



Once the notebook syncs, it will be made available to everyone on your team who you invited.

Of course, having an empty library isn't very useful. Now we need to add some content to it! I have a folder full of PDFs I've downloaded on using social media in business. Evernote is a much better place for me to store them than my hard drive, because I can easily share them with my team and have them read and act on them. To get them into Evernote, I'll simply select the documents I want to bring into Evernote, and drag them to the eBook Library notebook I just created.

This will automatically create a new note for each of the documents I've dragged in. The notes will be auto-titled with the filename of the document, which can be edited later.



Actually, retitling the notes is a very good idea, as this is an opportunity to create some consistency in your eBook Library. You don't have to go so far as to create a detailed system for organizing your notes, but you may want to at least put a consistent category name at the beginning of each note's title. In this case, I'm going to retitle each note so that it begins with "Social Media."

Now, the note list will stay organized by category.

Depending on how many eBooks, white papers, special reports, and other documents get added into your eBook Library, you may decide that it makes more sense to have separate notebooks for each category or topic, rather than having one notebook with everything inside.

Having a central library like this can be super-helpful, and it's a good idea to set some guidelines around its use so it stays that way. For instance, who gets to contribute new content to the library - is it one person, or a team? Whose responsibility is it to clean out the library from time to time and remove outdated or irrelevant material? Think about these questions before you set up your eBook Library to avoid potential confusion later on.

Your Company’s File Cabinet, Now Digital

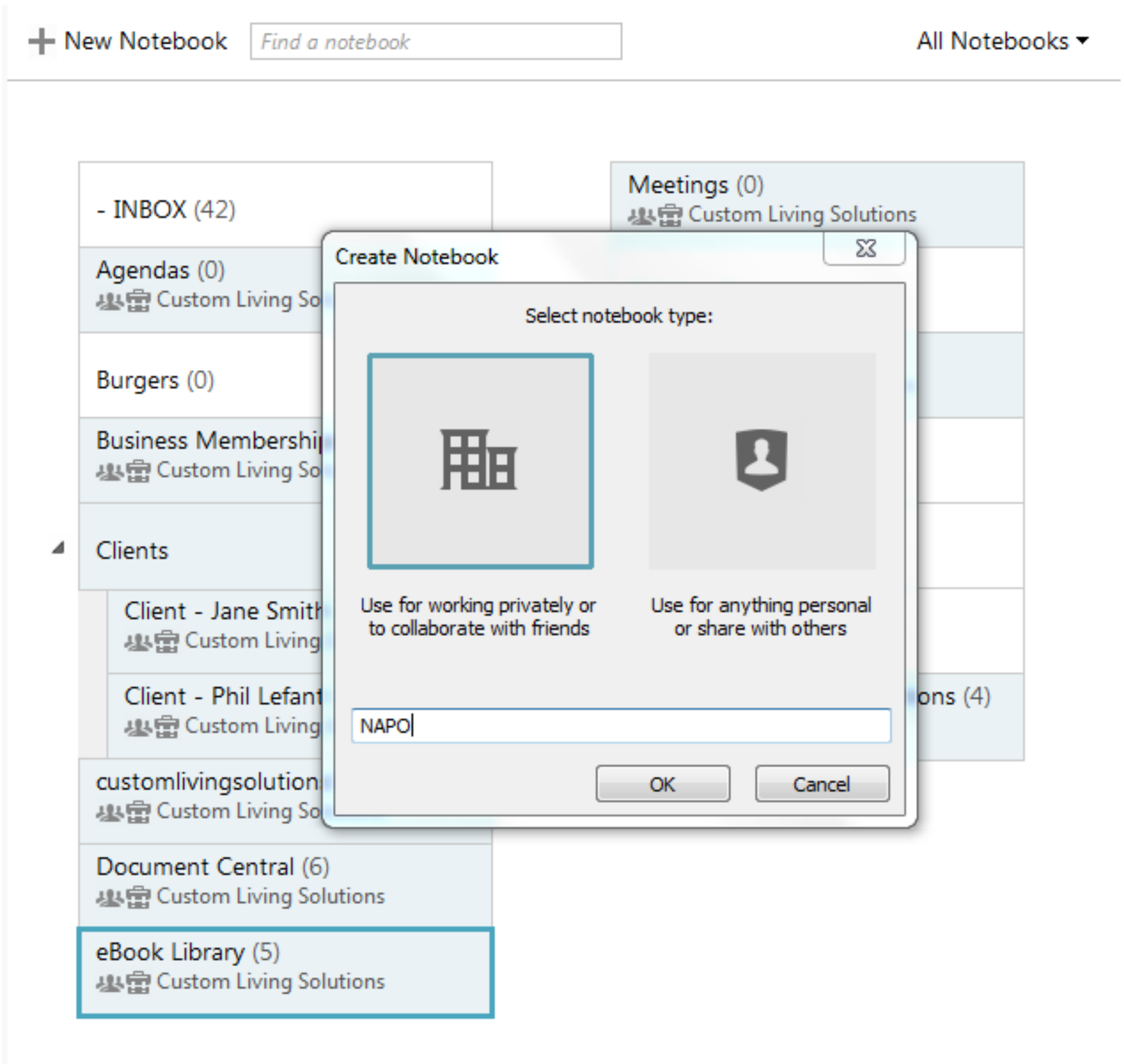
While Evernote isn't a server and can't really replace one, it can be a great place to centralize some, if not most, of your company's digital flies.

To get started creating a digital file cabinet in Evernote, you'll first want to make sure you've spent some time thinking about and setting up notebooks according to a structure that works for you and your organization. To give you some ideas, review *Chapter 8 - Setting Up Your Structure*, for inspiration and guidance.

Ideally, your notebook structure in Evernote will match up, as much as possible, with the structure you're using in your other electronic file storage system (and if possible, also with any paper files that you may have). This creates consistency across your various platforms, which makes it easier for everyone to find what they need, when they need it.

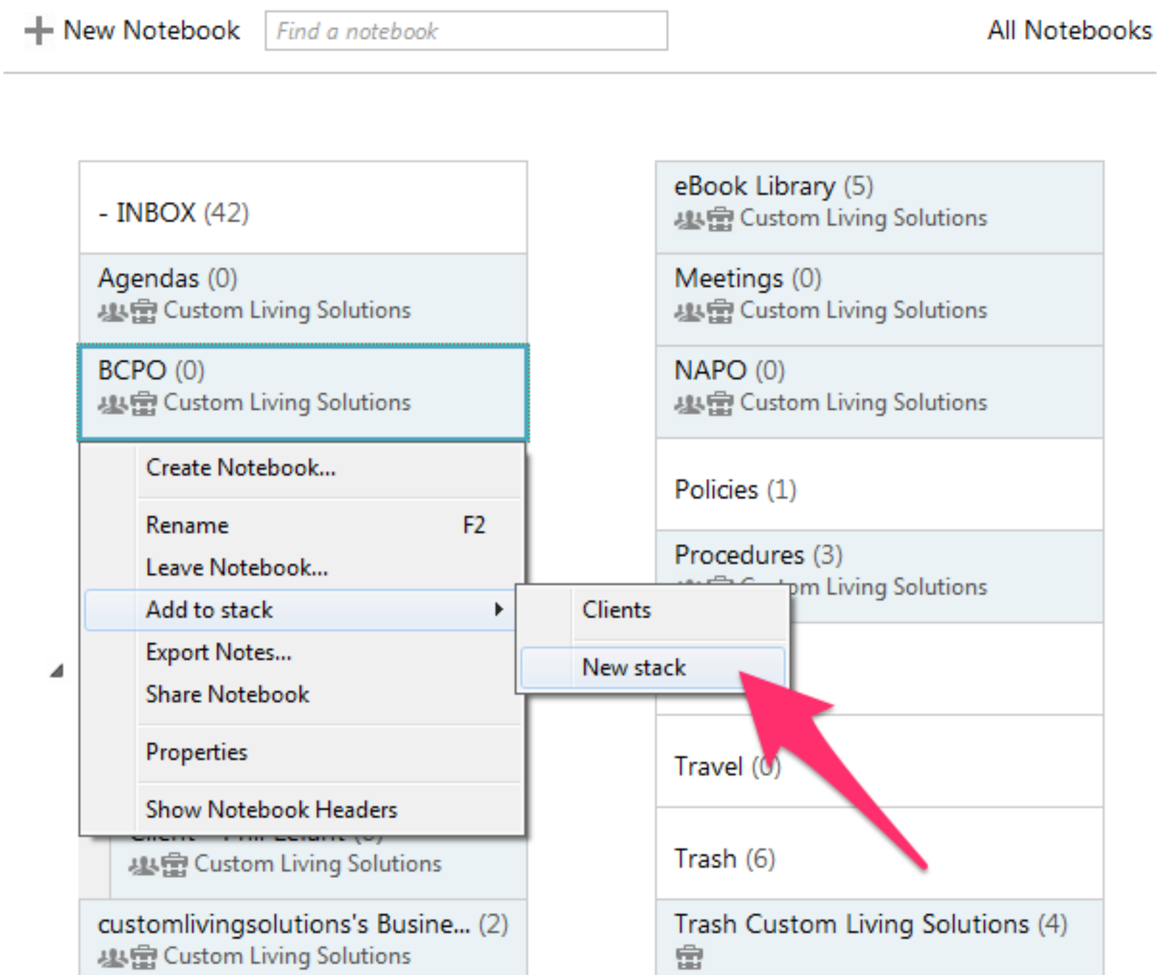
In this example, I want to take some documents related to my company's professional memberships and move them from my hard drive into Evernote.

First, I'll create a new notebook for one of my company's memberships, and name it "NAPO" (National Association of Professional Organizers).

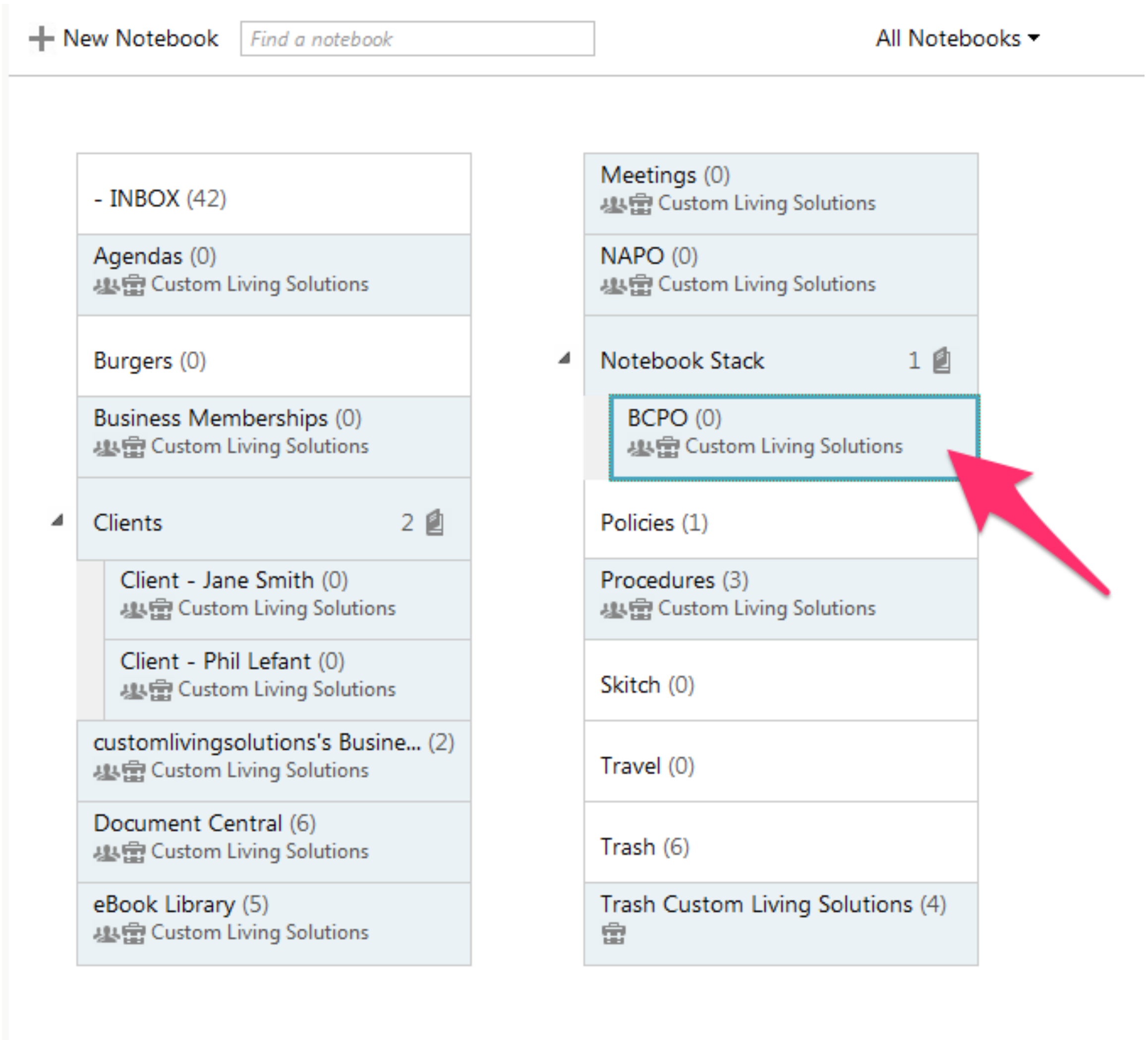


Since my company has multiple memberships, it makes sense to separate each membership into it's own notebook. To do so, we'll create a notebook stack - that is, a group of two or more notebooks - to keep things organized.

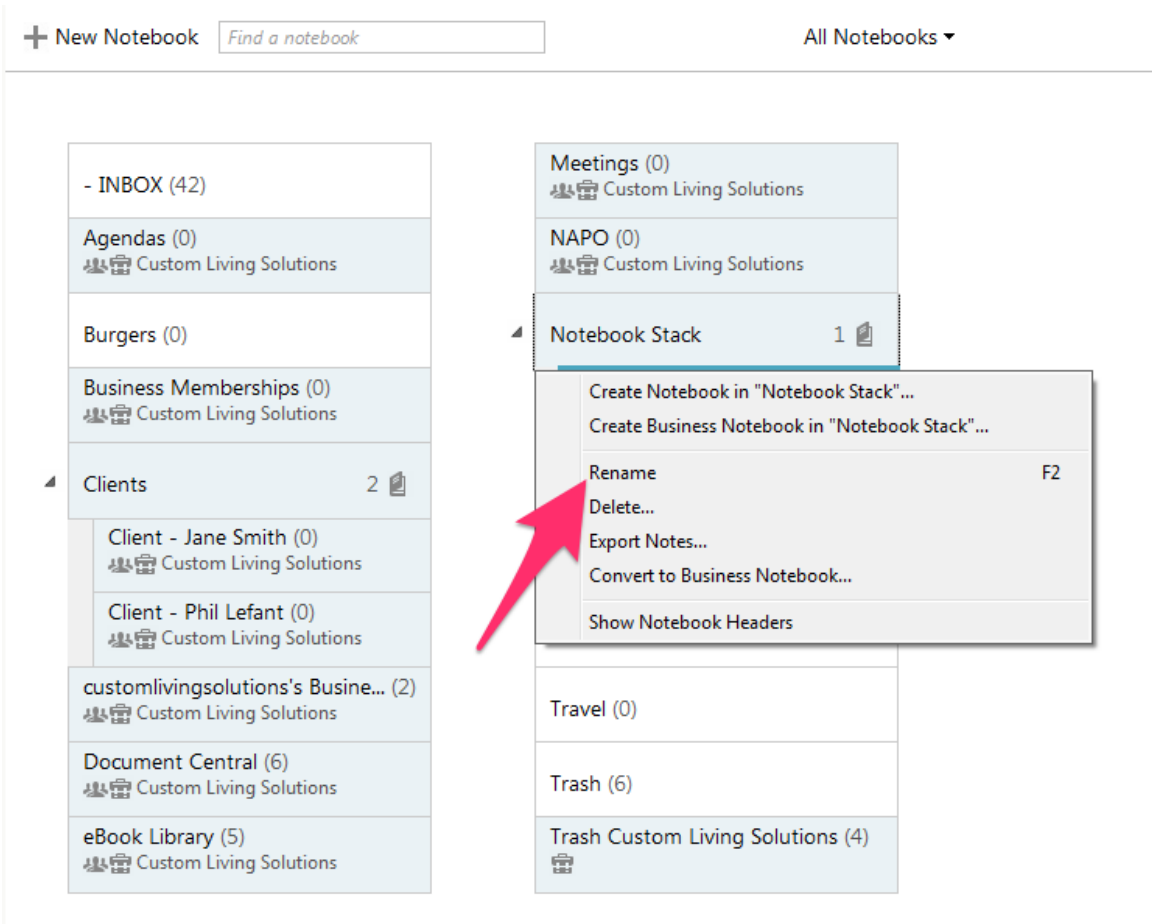
Let's start by making another new notebook, and name it "BCPO" (Board of Certification for Professional Organizers). Then, to create the stack, we'll right-click or control-click on the notebook, select “Add to Stack” and then “New Stack” from the pop-up menu.



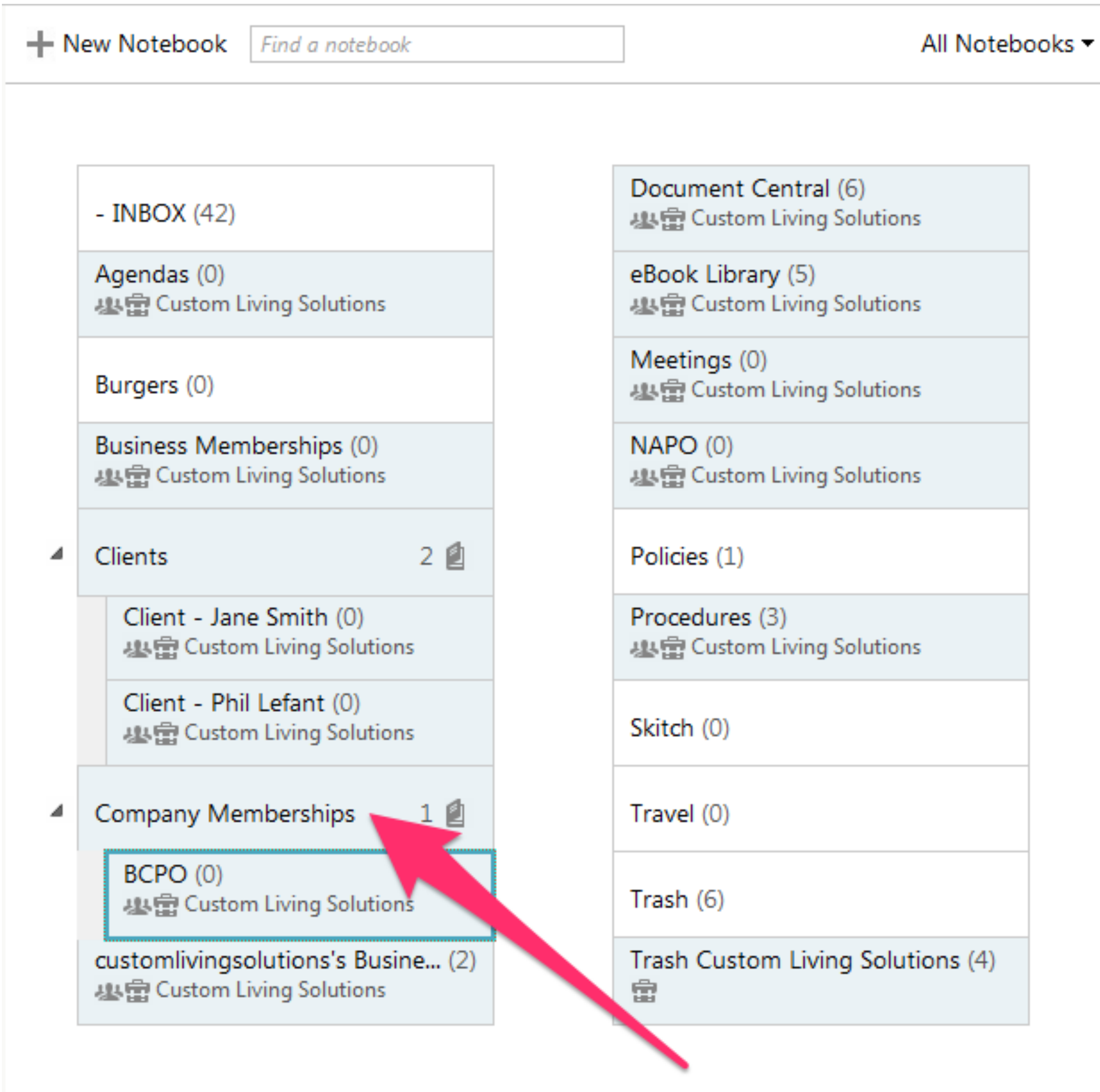
Our BCPO notebook will seemingly disappear - but don't worry, it's just moved to a stack called "Notebook Stack."



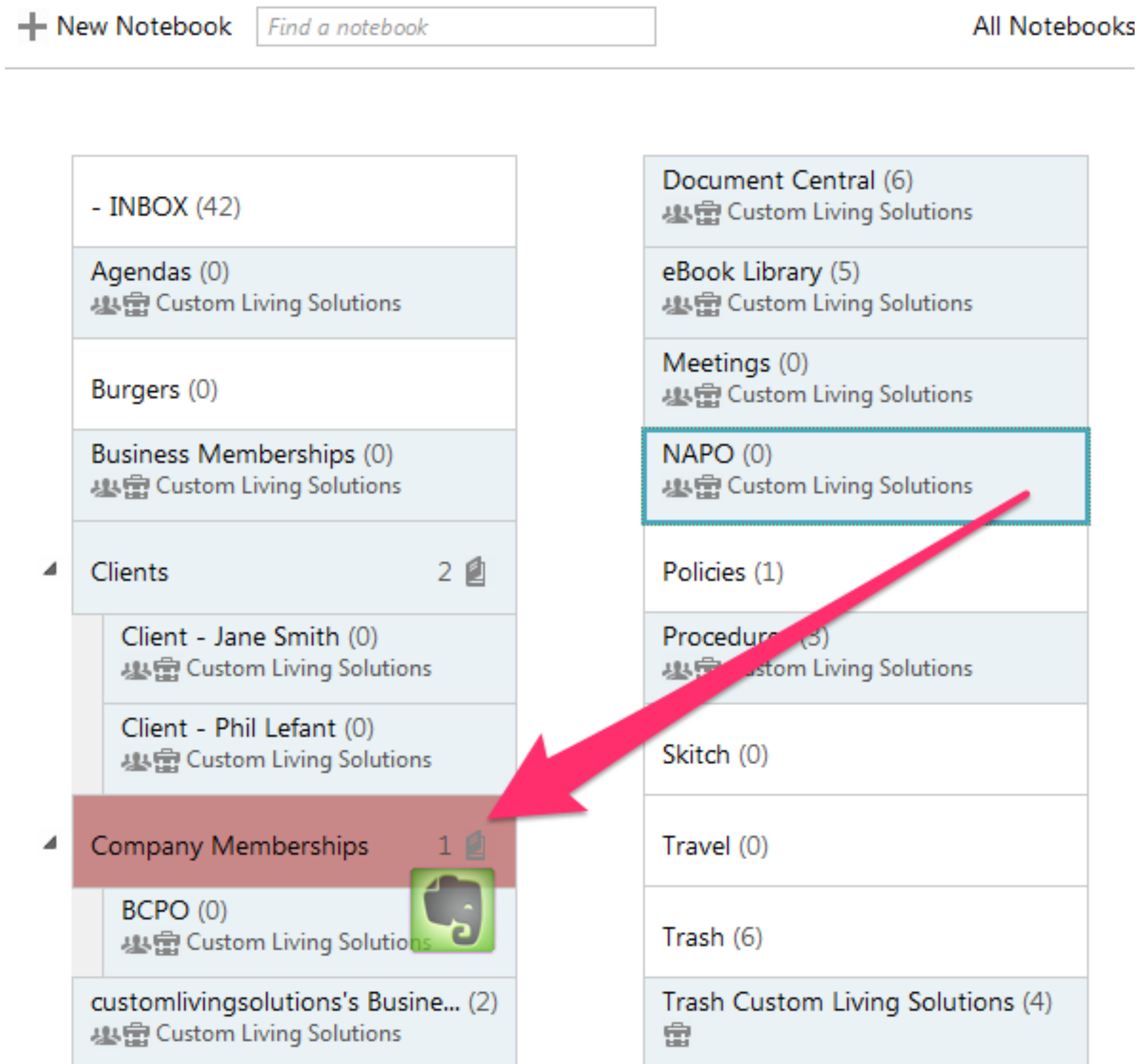
Now we need to rename the stack. Control-click or right-click on the notebook stack, and select "Rename Stack" from the menu. Let's rename the stack "Company Memberships."



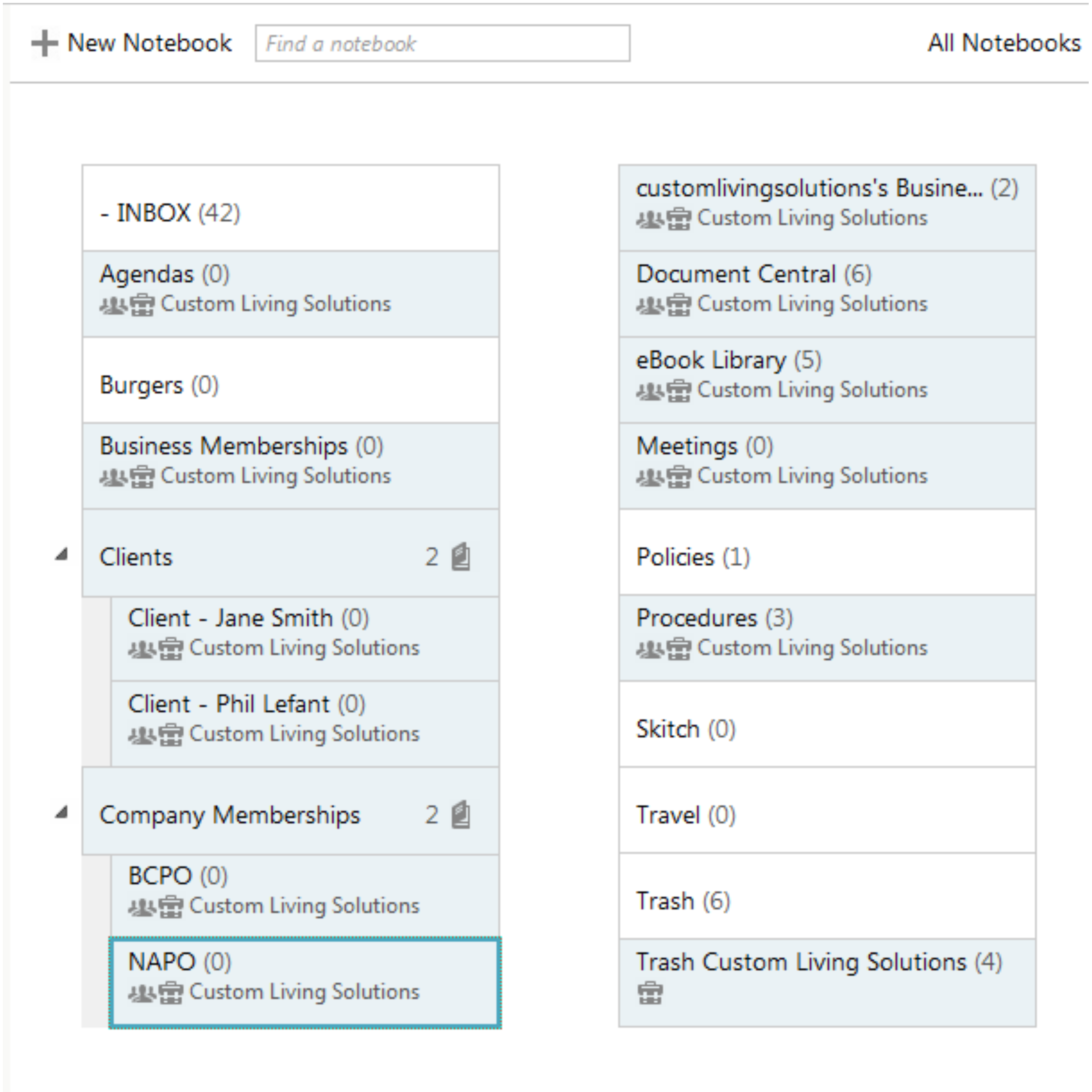
The new stack has been renamed, and we know it's a stack by the white "wrapper" around it (Mac) and the drop-down triangle to the left of it (Windows), along with the notebook count on the wrapper.



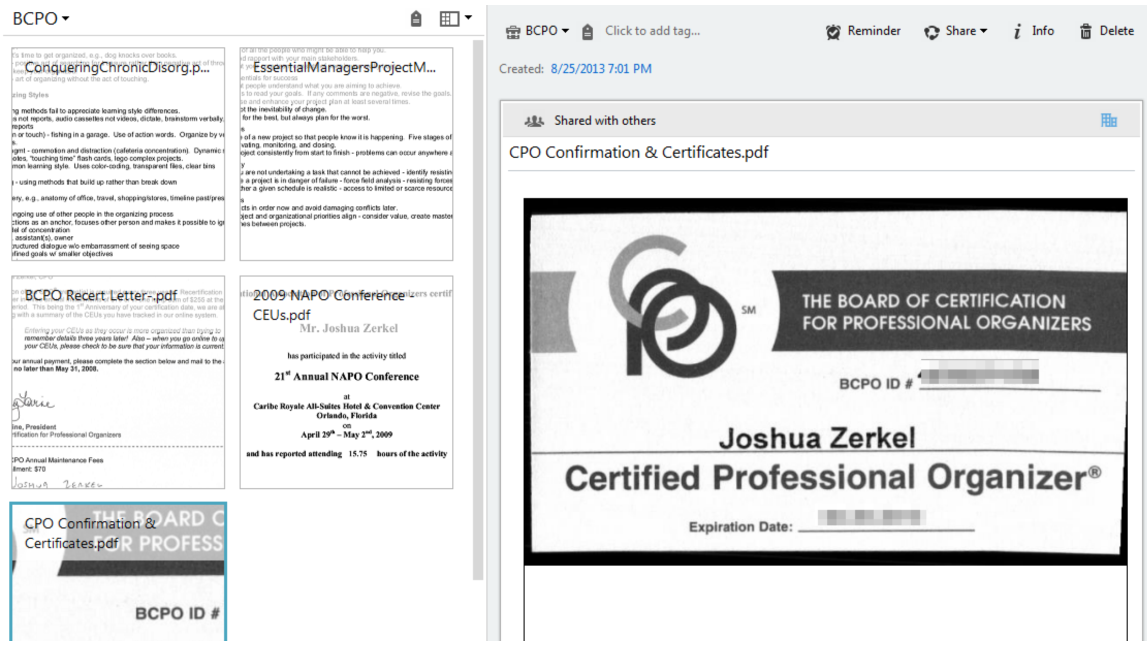
Now let's add our "NAPO" notebook to this stack by dragging it over.



It's added to the "Company Memberships" stack.



Let's put some documents into one of our notebooks. I've opened up a folder full of documents related to BCPO, and to bring them into Evernote, I'll just drag each onto the BCPO notebook. A new note will be created in Evernote from each document.



You can repeat this process for any files that you'd like to move from your computer, or your server, and bring into Evernote, and then share them with appropriate team members.

Of course, not all of our documents start out in digital format - in any given office there's probably lots of paper, and it's generally stored in a file cabinet (or series of file cabinets). Paper, in many ways, is the opposite of digital - only one person can access it a document at a time, it can be hard to find the document you are looking for, and paper is incredibly easy to lose or misfile. Fortunately, it's easy to get your paper documents into Evernote and to add them to your digital filing cabinet.

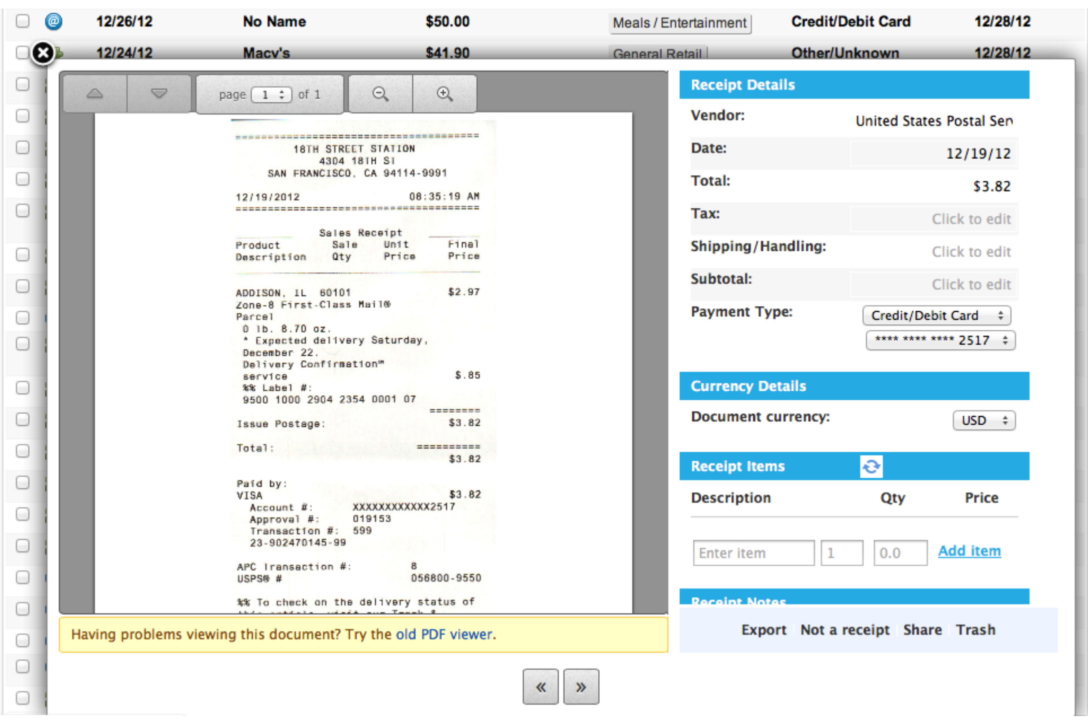
As it stands right now, Evernote's main built-in way to "scan" your paper documents is the Page Camera function that's part of the Evernote mobile app. Using your phone's built-in camera, Page Camera helps you snap photos of a document (receipts, business cards, and other papers), clean them up a bit, and store them directly in your Evernote account. Page Camera is designed to work most effectively with the Evernote Smart Notebook by Moleskine, but also can work with any paper.

While fine for the occasional document capture, using Page Camera on its own will be a very slow way to get the bulk of your paper documents into Evernote. To maximize your productivity and minimize the time it will take to transform your paper documents to digital, you'll likely need to use an Evernote-integrated add-on tool to effectively transform much of your paper into an Evernote-friendly format.

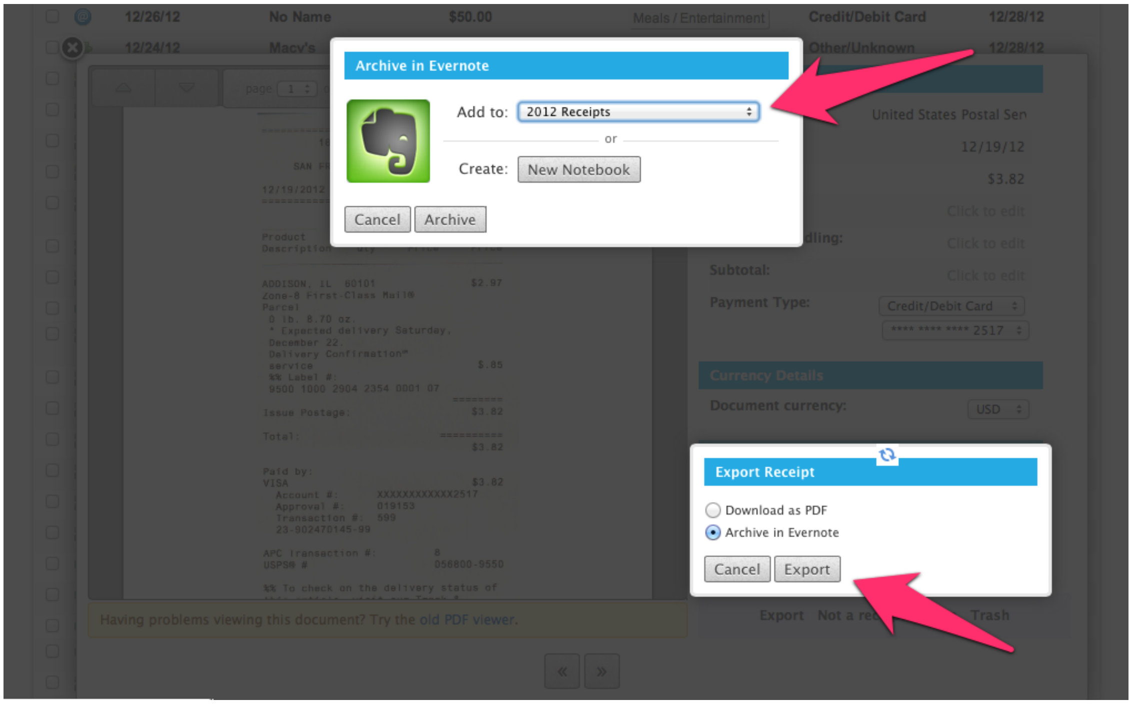
Options for getting your paper into Evernote generally fall into one of two categories - scanning services, or self-scanning. There are good options in both camps.

If you don't have time to scan documents yourself, or you don't have someone on your team who can be dedicated to scanning your documents, then you'll likely want to look into using a scanning service. With a service, you gather up your documents, send them (typically through the mail) to the service, they scan them for you, and then export them into Evernote. You don't really have to do anything at all!

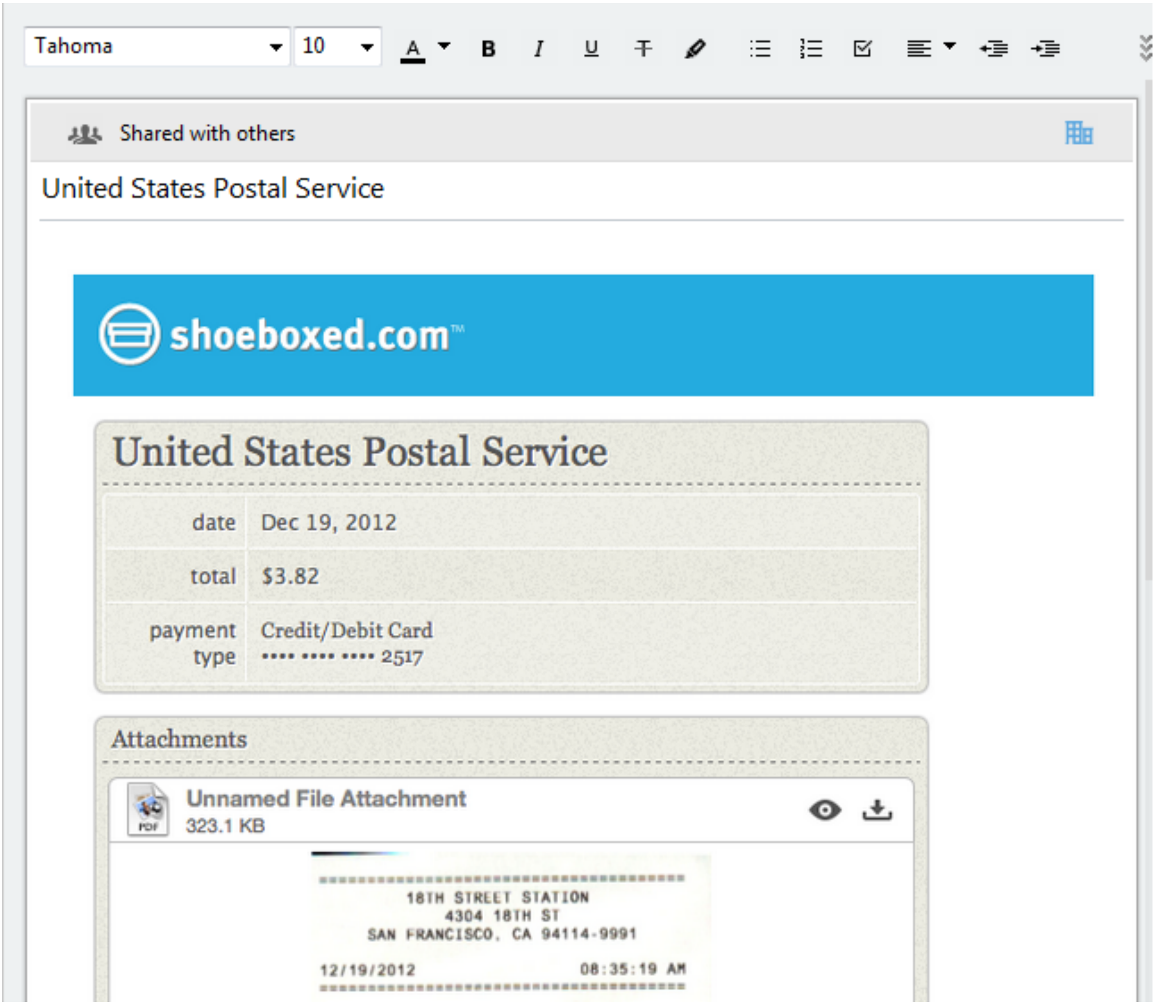
The primary scanning service that works with Evernote is Shoeboxed. When you sign up with Shoeboxed, you'll receive a pre-paid envelope. Fill it up with your documents, send it off to Shoeboxed, where they'll scan them on your behalf. In the example below, I sent them a receipt from the post office, where they scanned it and extracted the data from it.



Once scanned, you can export your documents to PDF, or like magic, have them show up in your Evernote account - in the notebook of your choosing.



Inside of Evernote, your scanned document can be organized however your want, and is searchable (just like the rest of your information that's in Evernote).



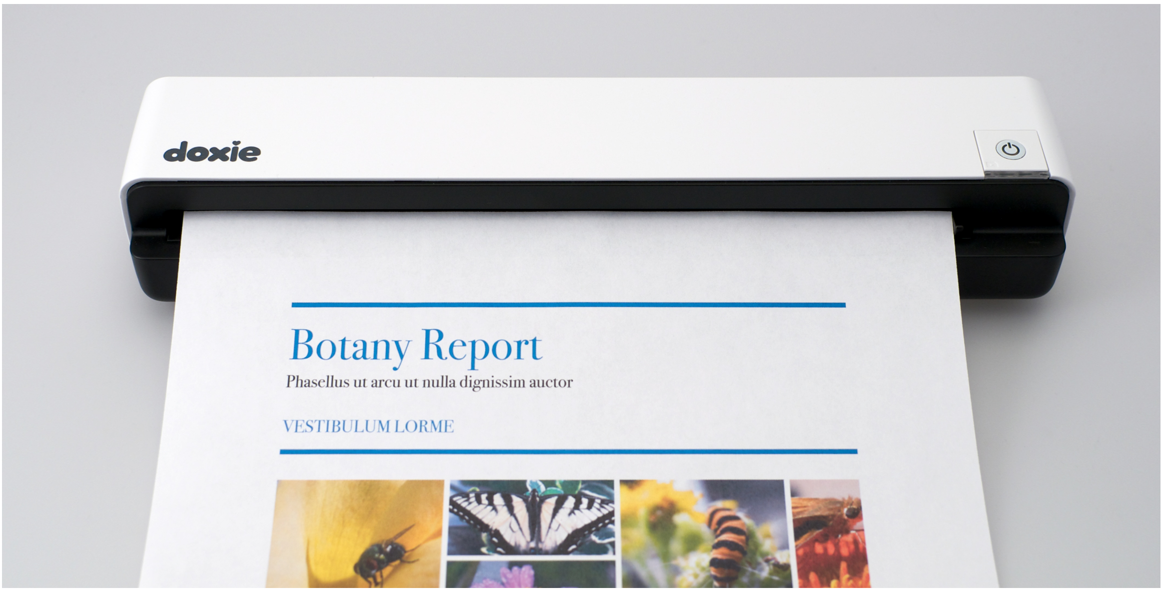
If you choose to dedicate internal resources to scanning, or if you just want more immediate gratification, there are several options to scan documents yourself (or have a team member do it), and have your documents go directly into Evernote.

Also, if you're working with sensitive or confidential documents, sending them to a scanning service may be counter to your company's security or privacy policy. Another key benefit of scanning documents yourself is security, as the documents never get sent to a third party.

Starting from smallest to largest, portable scanners, like the Fujitsu ScanSnap or the Doxie, are small enough to sit on any desk or fit in a briefcase or computer bag. They scan one document at a time, and let you send your scans directly into Evernote. If you have team members that travel frequently and want to send documents into your company's Evernote account from anywhere, these tools can help make that easy.

The Doxie Go is interesting because it can work without a computer. Once you charge up the battery, you can scan documents anywhere you happen to be -

even without a computer. When you get back to your computer, you connect the Doxie Go to your computer, or you take out the SD card and put it in your computer, and the included Doxie software lets you send your scans directly into Evernote.



The Fujitsu ScanSnap is even tinier than the Doxie Go and is powered directly by your laptop. It scans right into Evernote just at the touch of a button.

These portable scanners are great if you or a team member is on the go, or has a very light scanning needs. However, if you're trying to get reams of paper into Evernote, you'll want something heavier duty. For those times, a dedicated high-speed scanner will serve you much better than a small portable scanner might.

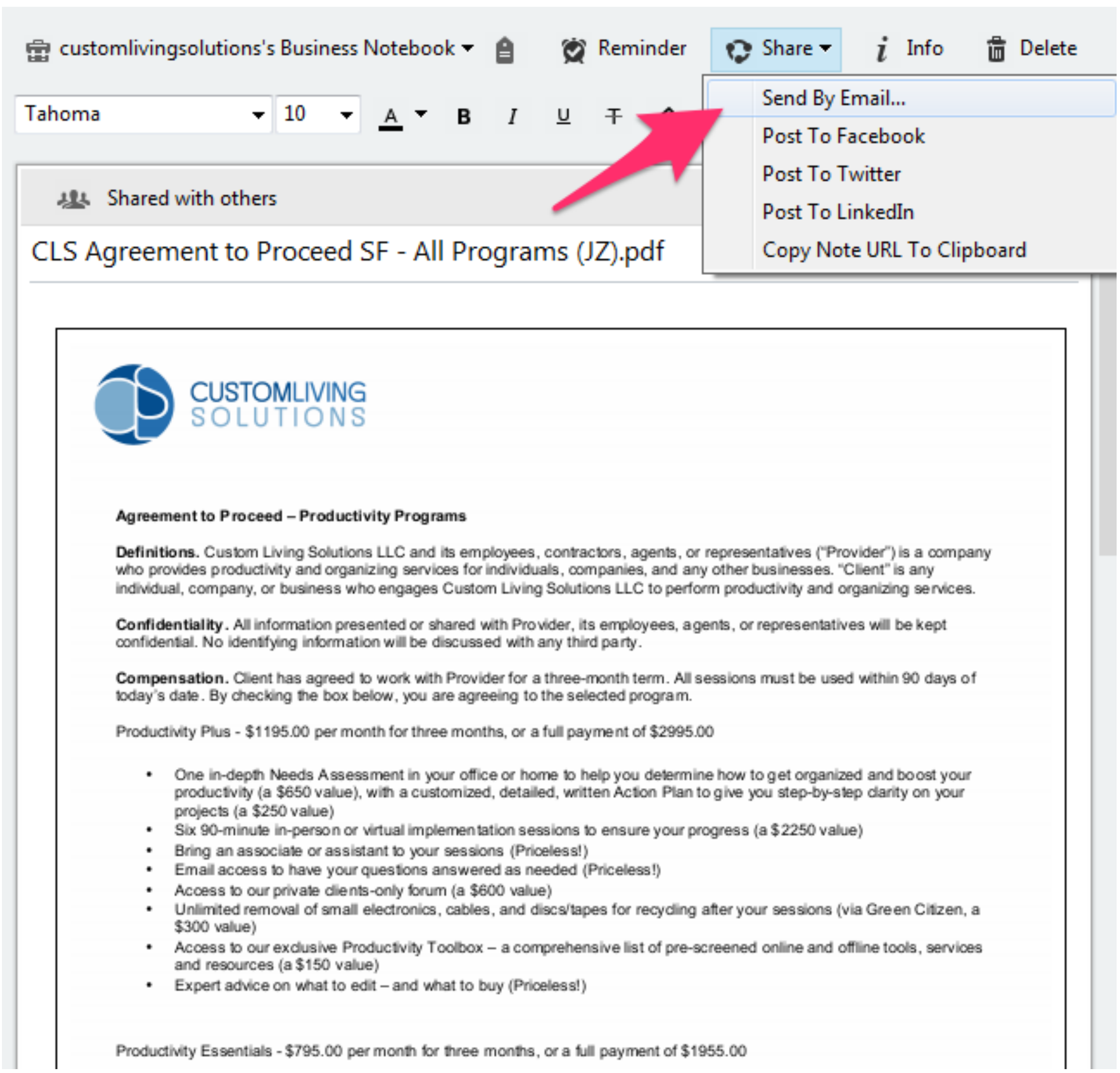
The Visioneer OneTouch and Fujitsu ScanSnap are dedicated scanners whose sole function is to scan stacks of documents and send them right into Evernote. This is a lot faster than scanning documents one at a time.

Putting the “E” in Your Electronic Documents

In previous chapters, you've seen some of the ways that Evernote can help you organize, centralize, and share your company's documents. But in addition to just storing and sharing your files, there are ways you can use Evernote for creating and completing your documents.

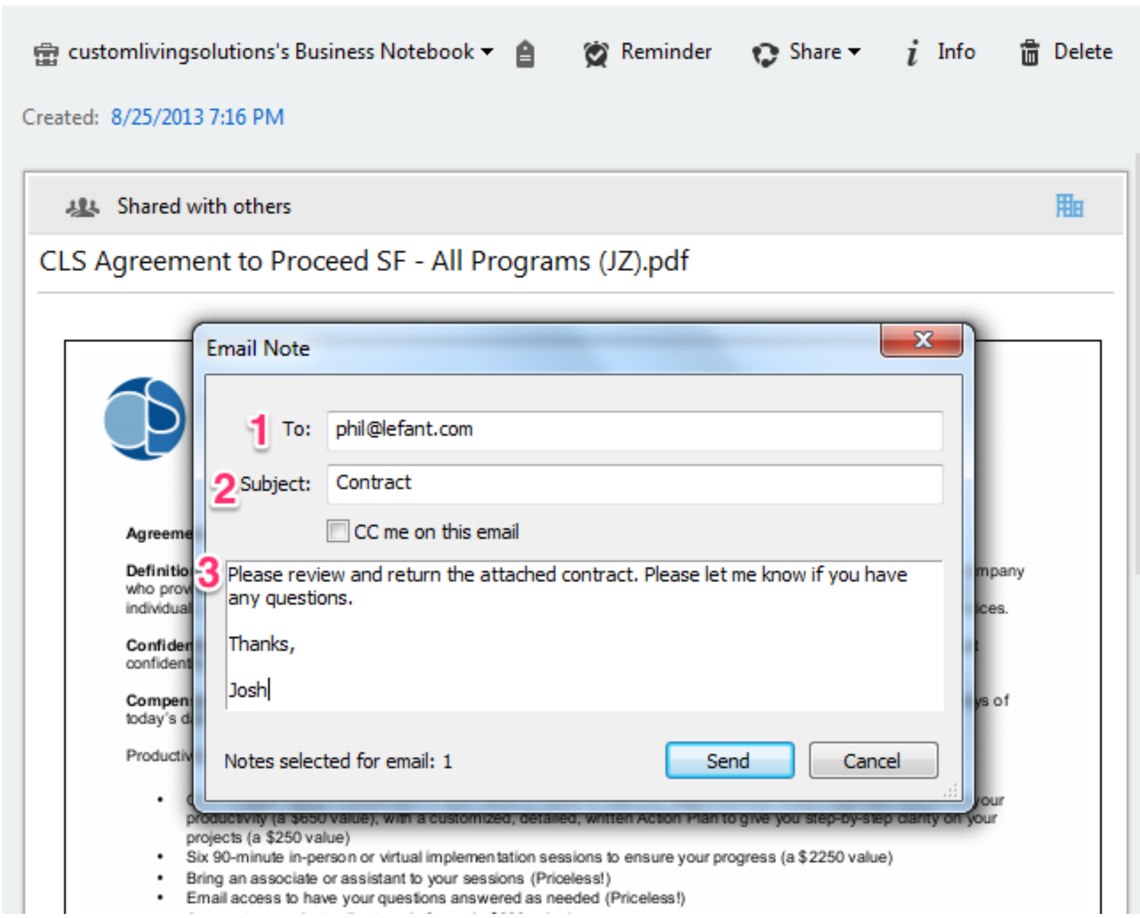
In the process of working with business documents, you probably need to do more than just create them - it's likely that you'll need to send them to other people, and especially with business documents, you'll probably need some signed from time to time. Evernote and its integrations make this process seamless.

Sending documents to another person that are stored in Evernote is easy, as Evernote has built-in tools to make this happen. From the top of any note, click on the "Share" button. In the example below, I'm sharing a contract with a client.

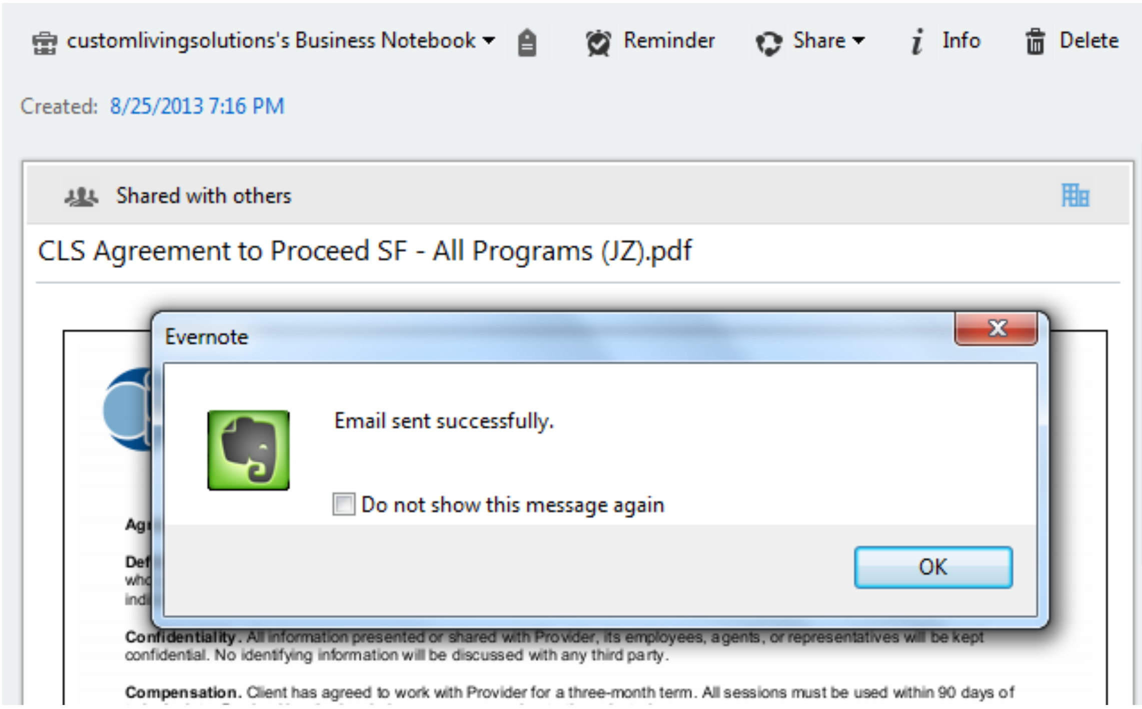


From the sharing pop-up menu, you can choose to share your note (and any documents that are attached to it) on social media, via email, or you can copy the URL and paste it into the body of an email you're composing in your email program. For this example, lets say we want to share a contract via email. To do that, I'll click on "Email Note" from the menu.

A pop-up window lets you select one or more recipients (1), choose the subject for the email (2), and add a message (3).



Click send, and the email, with the note included, is on its way to the recipient.

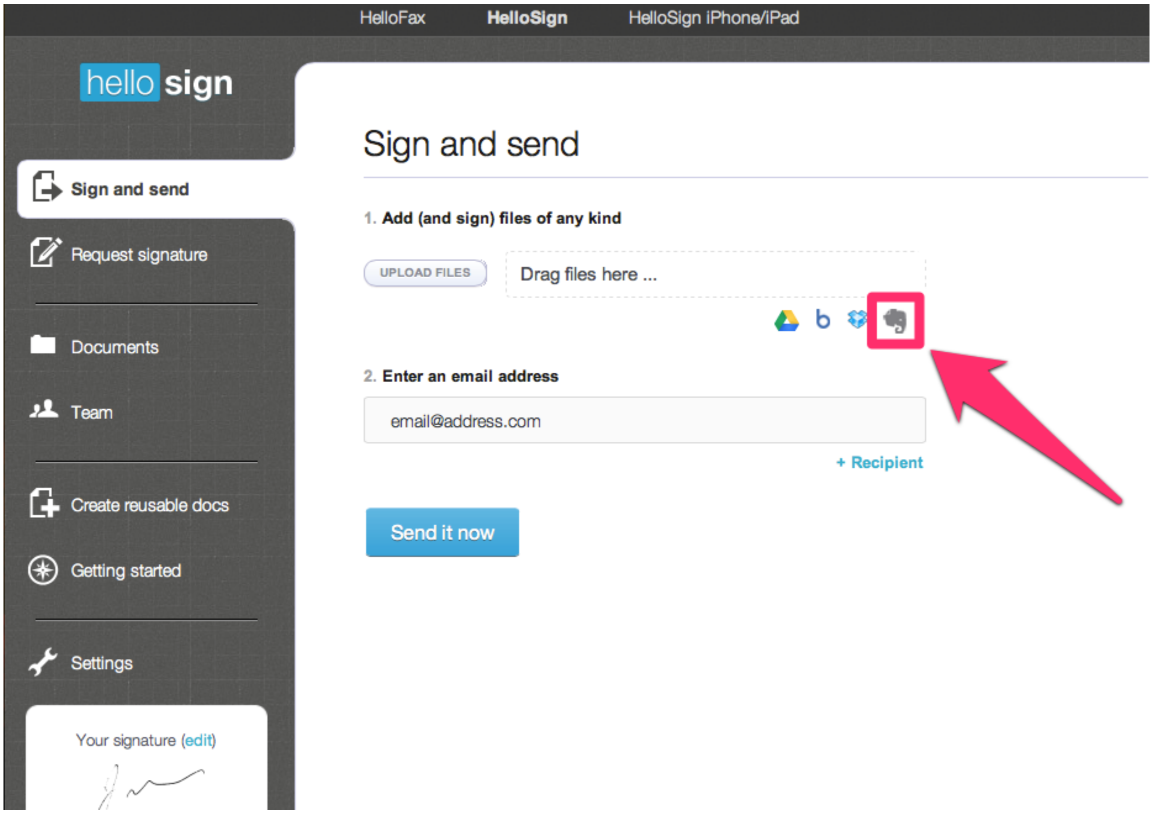


Sending notes via email can be helpful for when you simply want the recipient (or recipients) to view a note and/or its attachments. But there are other times when you'll want someone to go beyond just seeing a document - in business, documents often require signatures in addition to just being looked at.

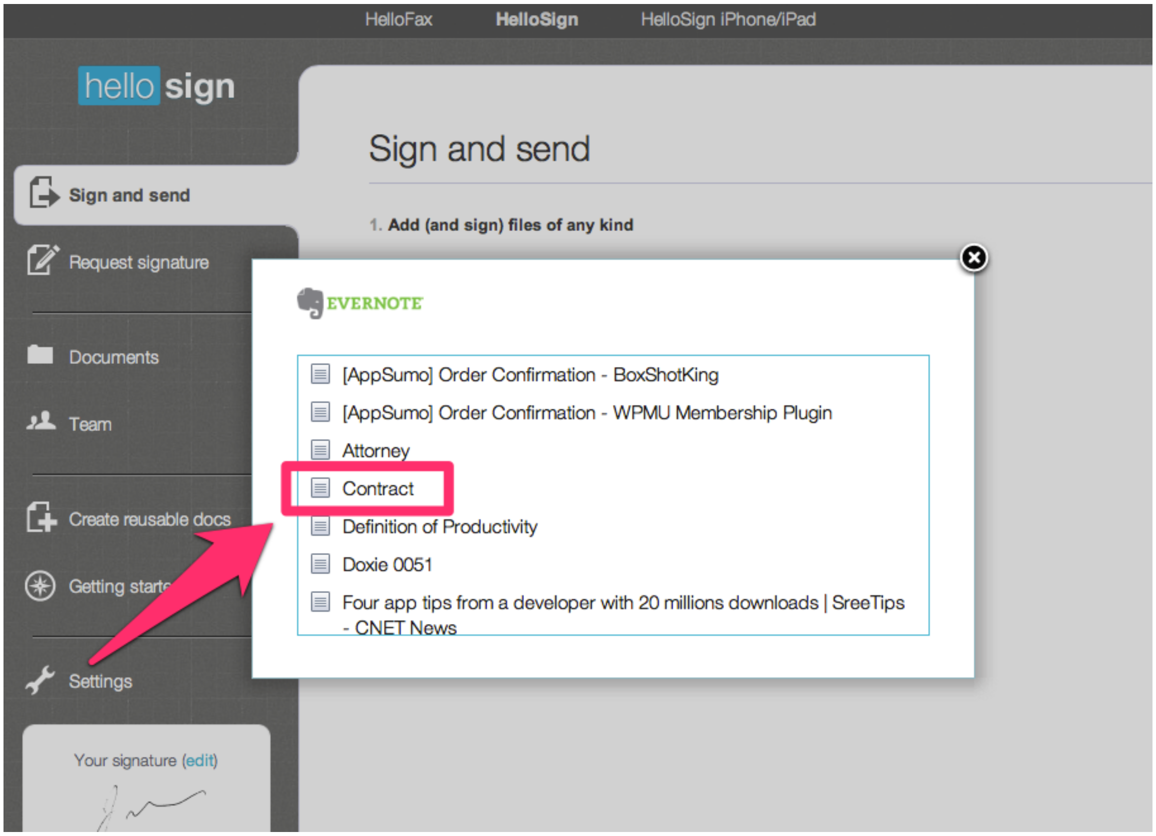
On its own, Evernote has no built-in tools to help you get a document signed, so we'll look to an Evernote-integrated add-on to make it happen. There are several tools that specialize in taking your Evernote notes and helping you get them signed, including HelloSign, DocuSign, and RightSignature.

Essentially, these tools work similarly. First, you create a note in Evernote that you'd like to have signed. Then, using one of these tools, you add fields to the note for signatures, initials, etc. that you'd like the recipient to fill out, and then send them from the tool to the person whose signature you'd like to get. Once they receive it, they can electronically and securely "sign" the document, which you'll then receive.

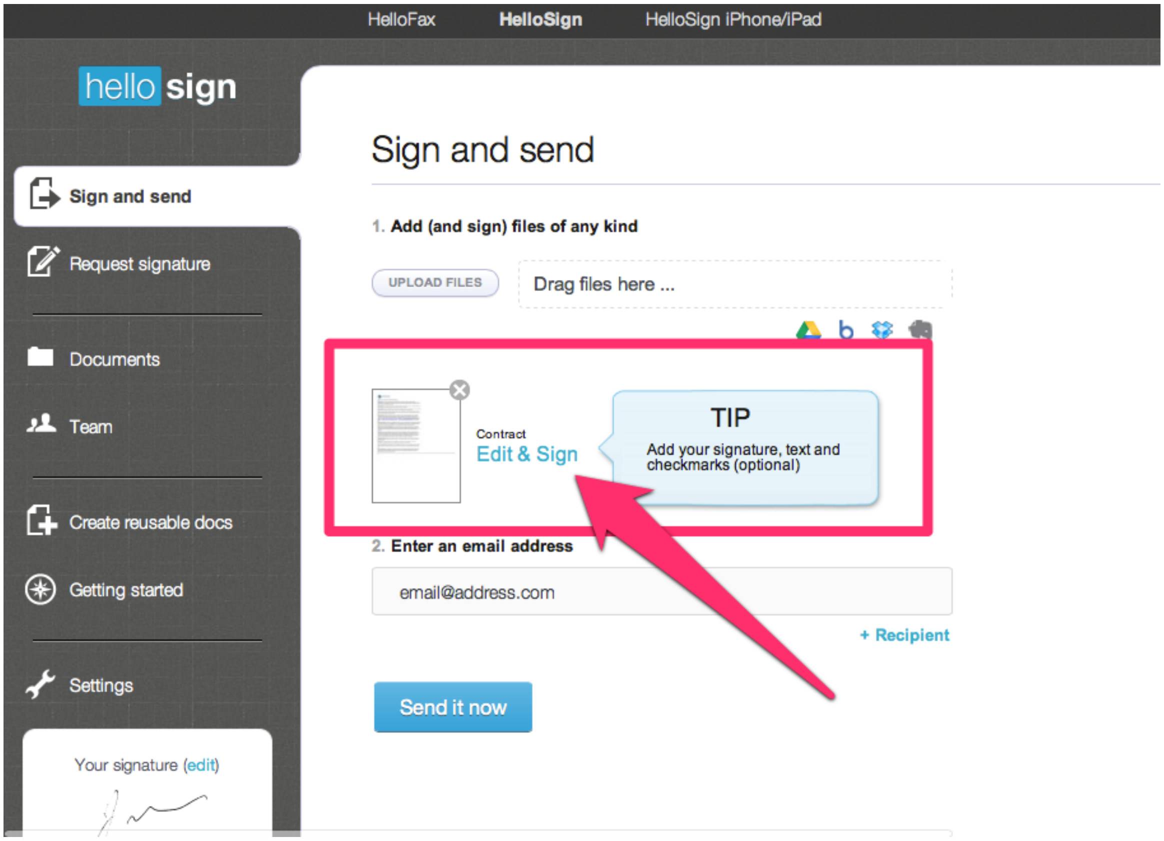
In this example, we'll use HelloSign to get a contract signed. First, I'll open up HelloSign, and I'll click the Evernote icon.



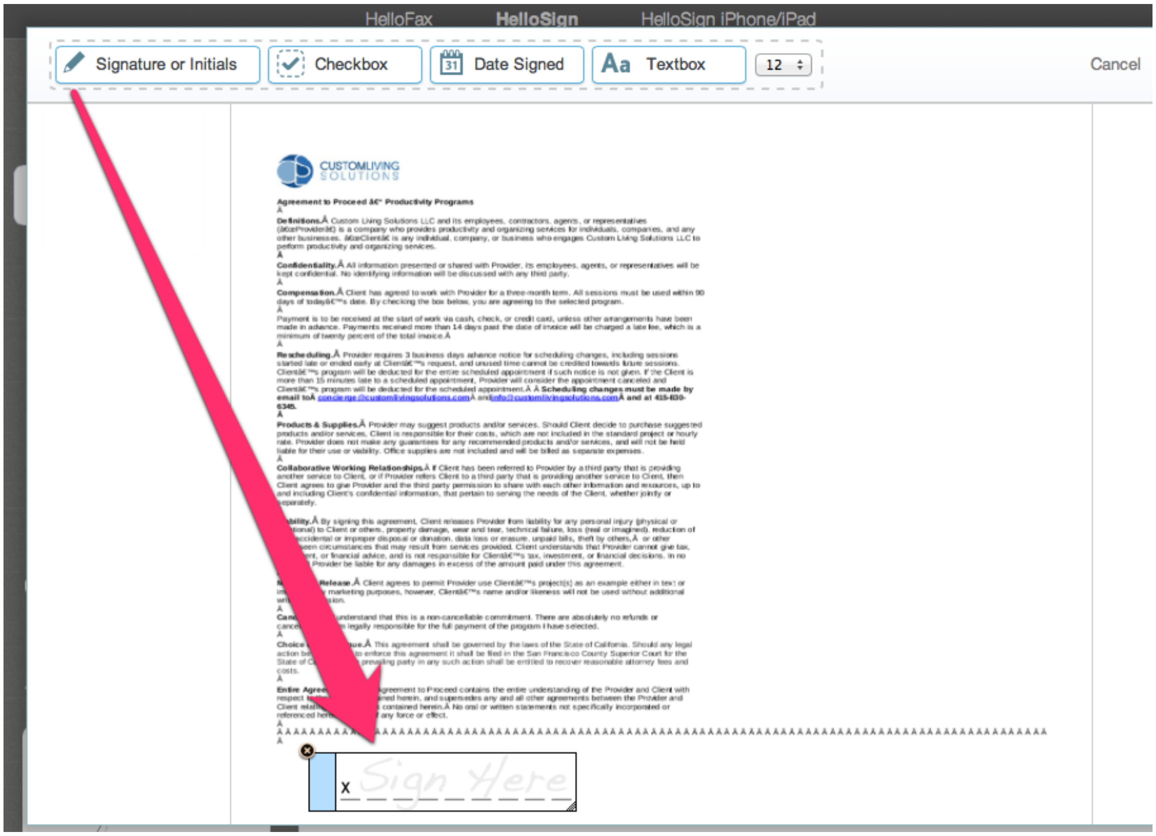
Then from the pop-up window, I'll select my contract from the list.



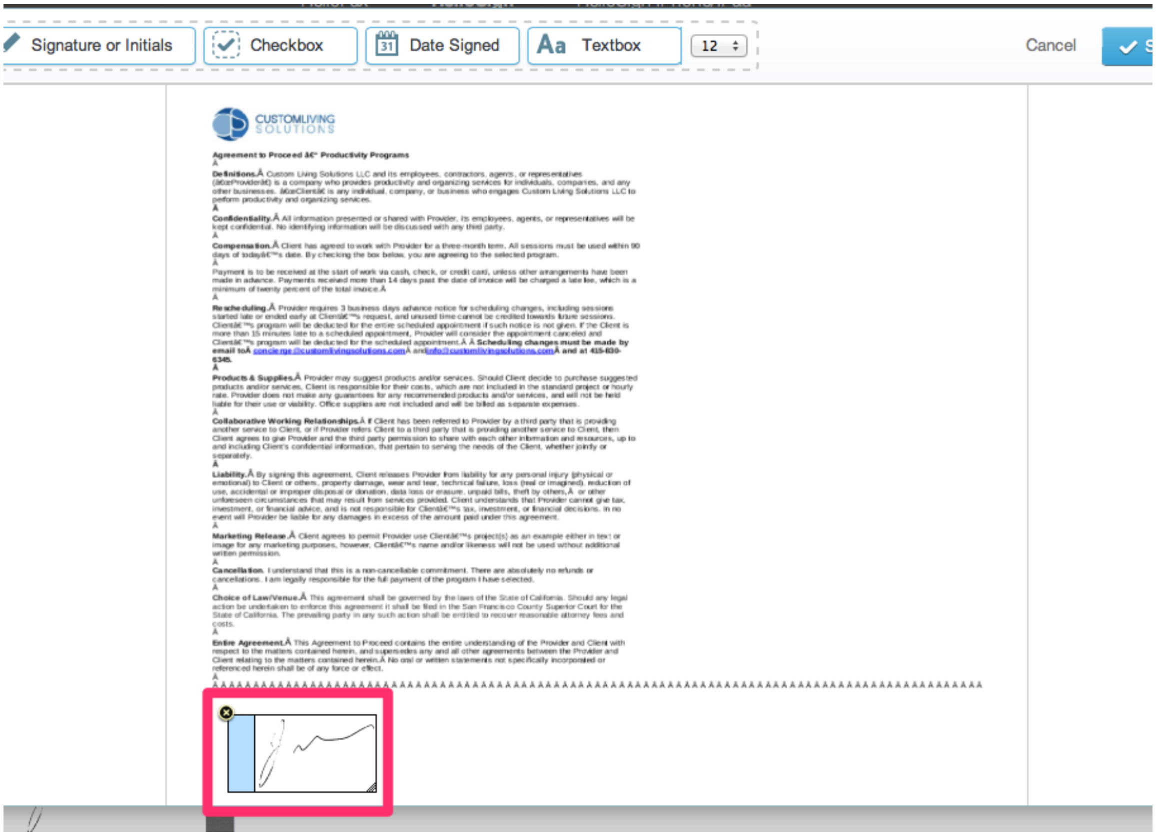
The contract has been imported into HelloSign, where I can add signature and other fields to it. I'll do that by clicking on "Edit & Sign."



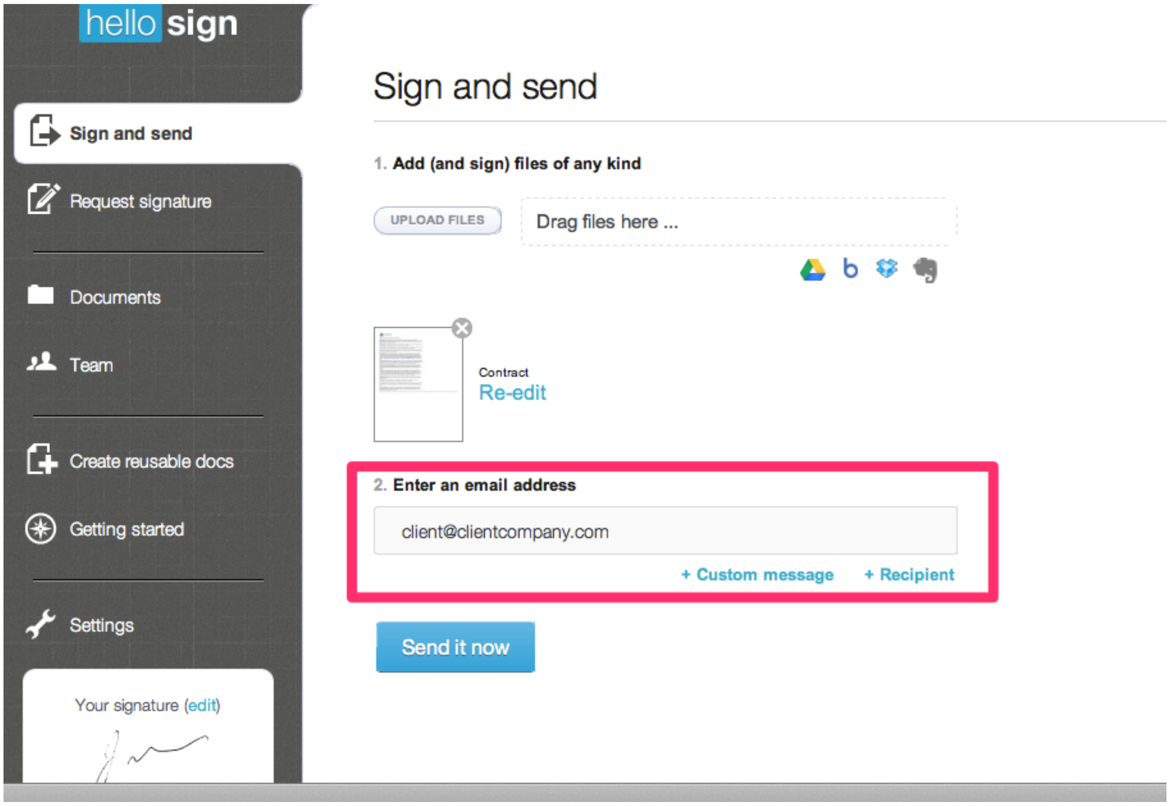
Then I can drag onto the document any fields I want - signature, date, checkboxes, etc. In this case, I need to sign the document, so I'll just drag out a signature field at the bottom.



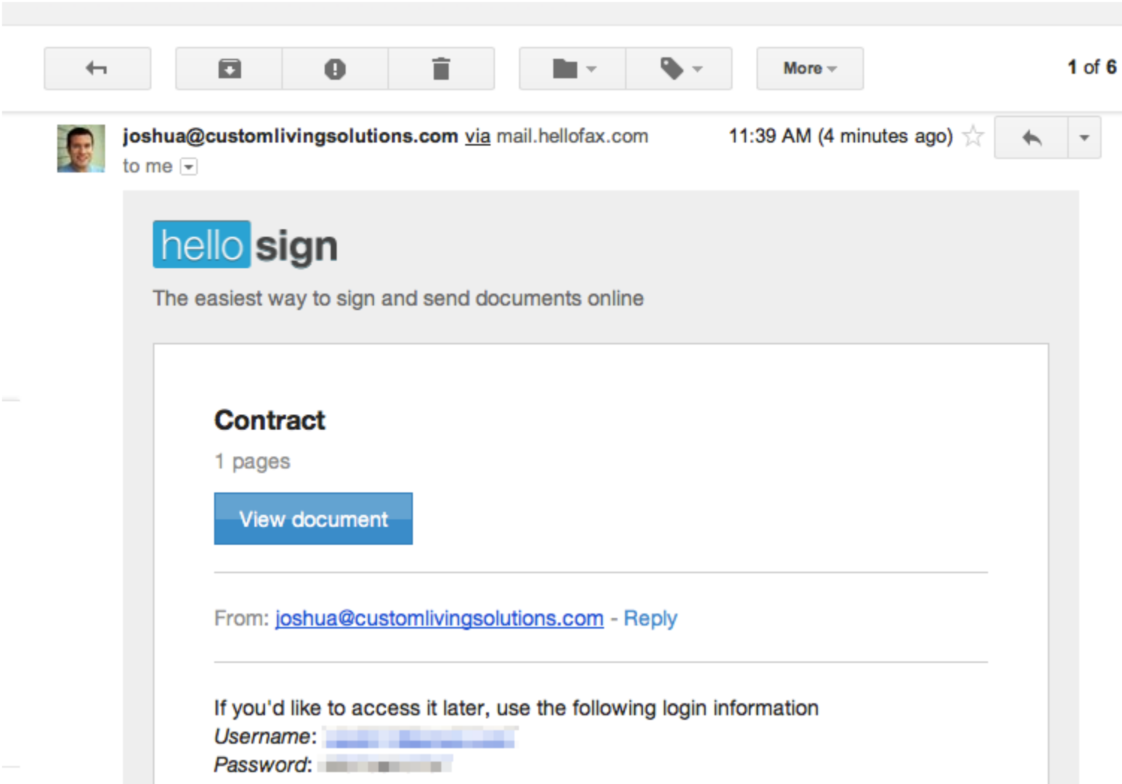
Since I have the option to draw a signature or import one that I've scanned. Since I've used HelloSign before, my signature is already stored with them. I can also add fields for the recipient to add their signature as well as
any other relevant information.



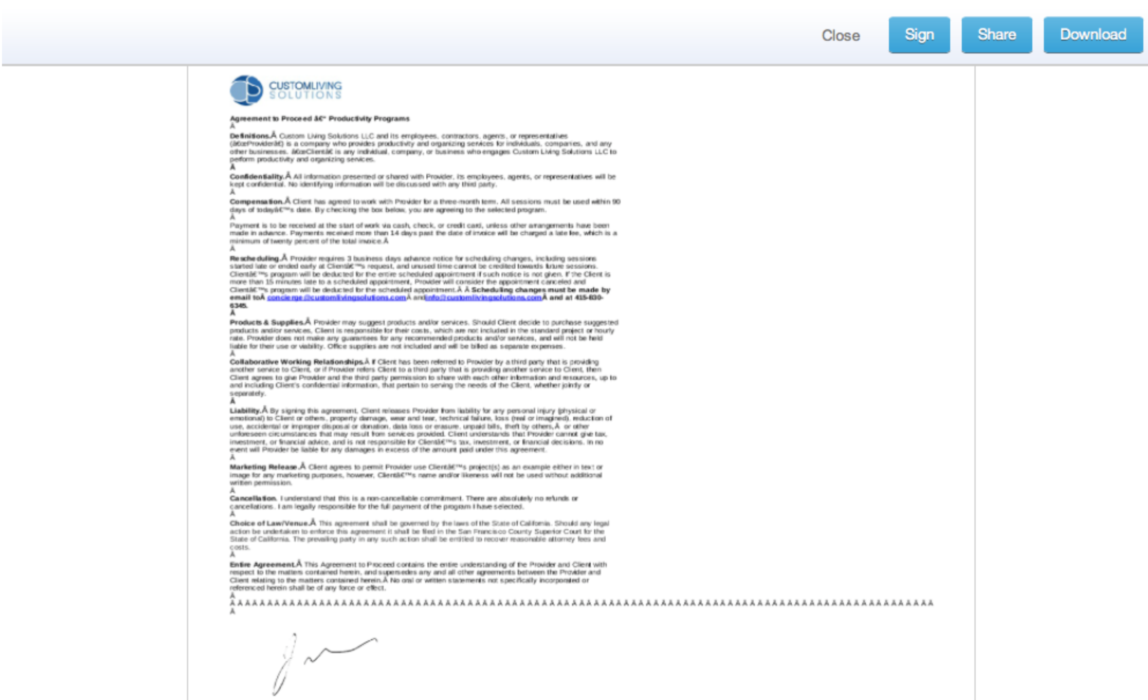
Once done editing, I can then specify who this document should be sent to, as well as add a custom message to the email that they'll be sent.



The recipient then receives notice via email that the document is ready for them to view. They simply click on the link in the email to view the document.



They then can see the signed document, add their signature if they want or need to, share it with others, or download a copy to their computer. When they add their signature, the original sender (in this case, it would be me) gets the updated copy via email, which can then be saved back into my Evernote account.



This entire process, from document creation to final storage, has been managed via Evernote - with all the accompanying benefits (central document storage and access for your team, easy retrieval, and ability to retrieve your documents from anywhere). Additionally, the workflows outlined here have been completely electronic and paper-free!

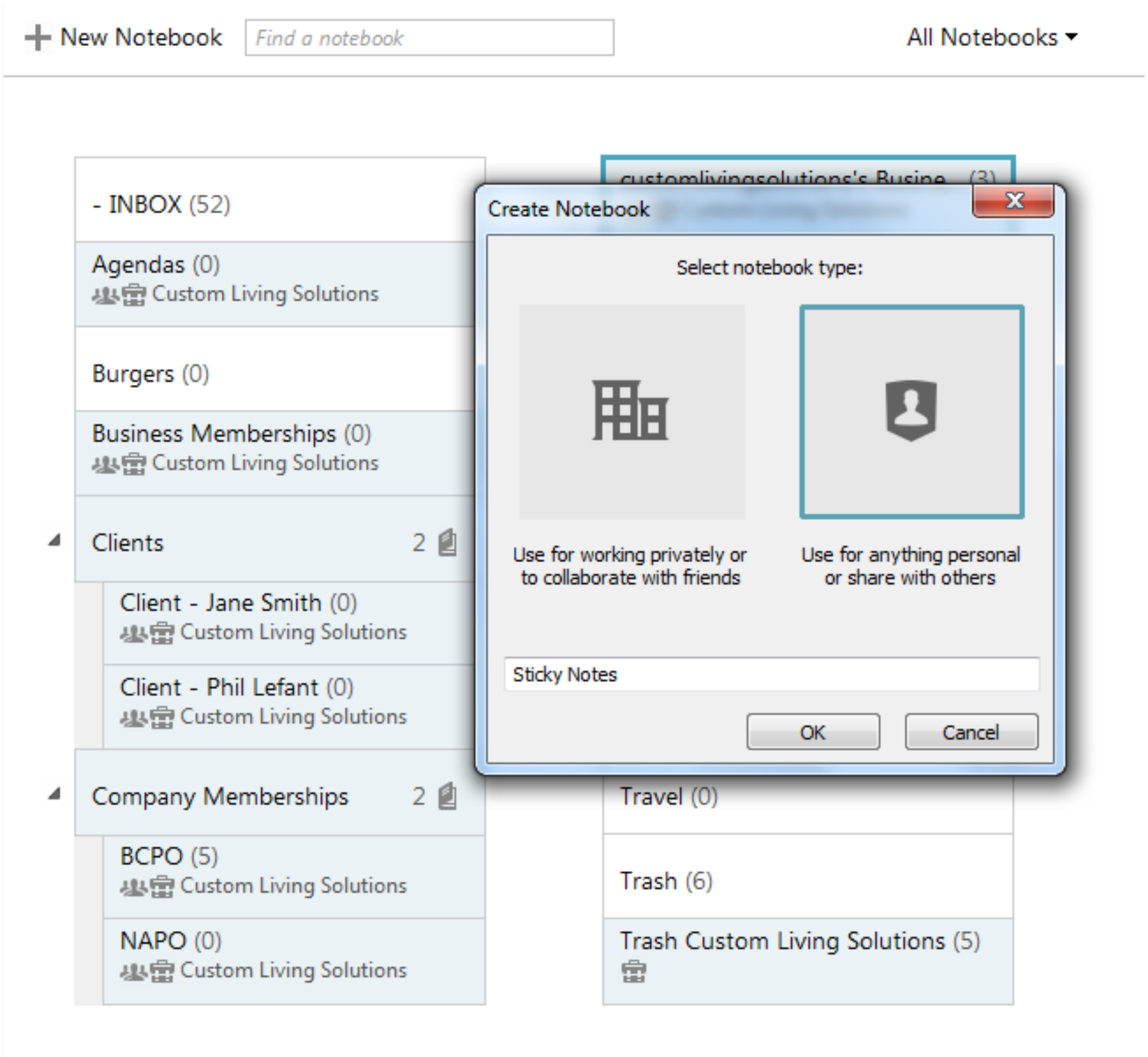
Desk De-Cluttering

To be sure, Evernote's great for organizing, sharing documents and collaborating with your group. But while all that big-picture stuff is great, let's face it - sometimes our own individual desks or workstations could use some help with organization too. Evernote to the rescue!

If your desk is littered with piles of miscellaneous paper or your monitor is framed by an array of sticky notes, chances are you lose important items from time to time, or maybe you're just frustrated with how things look. With a very small amount of effort, you can get everything into Evernote, organize it, and make everything accessible - and you'll eliminate the clutter as an additional benefit!

Sticky notes are helpful when you have just one or maybe two of them attached to your monitor, but when you have dozens of them, they just become clutter. Since they're small, they also have a tendency to become lost very easily. Let's eliminate these problems by getting your notes into Evernote. You don't have to break yourself of the sticky note habit - but we can enhance it to make it more useful. Here's how:

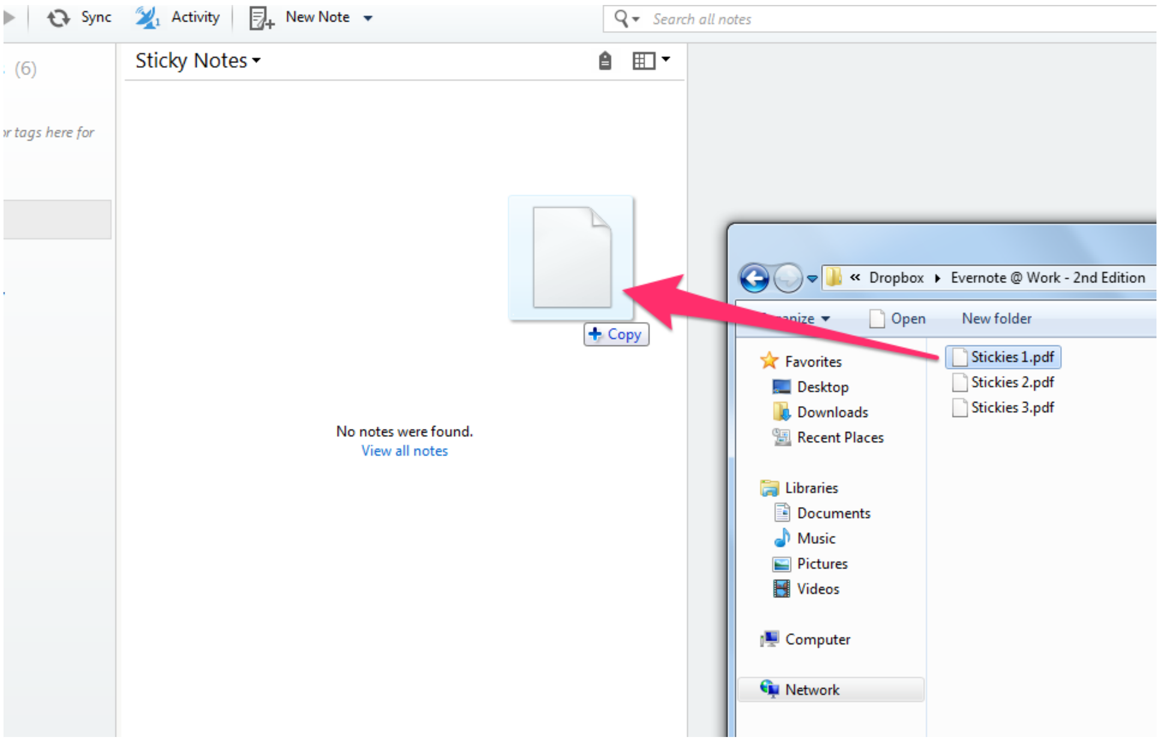
First, let's create a new notebook called "Sticky Notes." Since these sticky notes probably won't be relevant to anyone else, we'll make this a personal notebook.



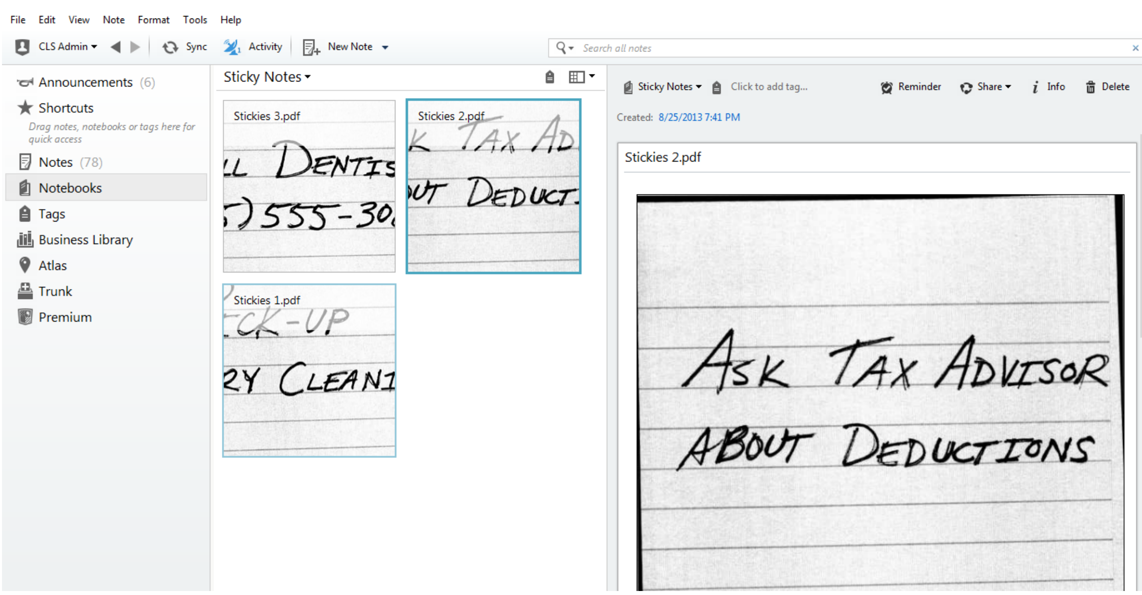
Now we need to add some of your existing sticky notes to the notebook that you just created. There are a few ways to do this:

- Use the Evernote app on your smartphone to capture them directly into Evernote
- Take photos with your digital camera and then drag them into Evernote
- Snap pics of the sticky notes with your computer's webcam and bring them into Evernote
- Scan them using a desktop or portable scanner

All of the above methods work well. For this example, I've captured a few sticky notes to my computer using my digital camera. I'm just going to drag each to the "Sticky Notes" notebook.



A new note gets created for each one.



Since Evernote recognizes text (even handwritten text), these sticky notes are now searchable. For instance, if I can't remember the phone number for my tax advisor, I can now search for "advisor" and the corresponding sticky note pops up. Try doing that with the stickies around your desk!

As you create new sticky notes, try getting into the habit of taking photos of them. If you lose the physical one, at least you'll still be able to retrieve the information, as it will be safely stored in Evernote.

As for any miscellaneous documents around your desk, those can find their way, as appropriate, into Evernote. Maybe you don't want to put your working documents into Evernote, but perhaps any documents you need to reference frequently can find new homes in Evernote. You can create a notebook for "Desktop Docs" or something similar, and use the techniques outlined in *Chapter 14 - Creating a Digital File Cabinet* to scan or capture your papers and get them into Evernote.

Business Foundations – Action Plan

In this section, *Business Foundations,* we covered a lot of ground. You learned how to:

- Create a centralized home for all your employee and HR documents
- Find a spot for your company's polices
- Document your team's procedures as well as the step-by-step instructions on how to accomplish specific tasks
- Build your company's eBook library
- Take both digital and paper documents and create a digital file cabinet
- Send electronic documents - and get them signed
- De-clutter your individual desk

Now it's time to take action!

What do you need to do or put into place to start creating some of these business foundations in Evernote?

What is the first thing that should be accomplished?

Who would be responsible for implementing that?

What tools are needed to complete the task?

What is the deadline for getting this implemented?

Who will verify that this has been completed?

Part 3

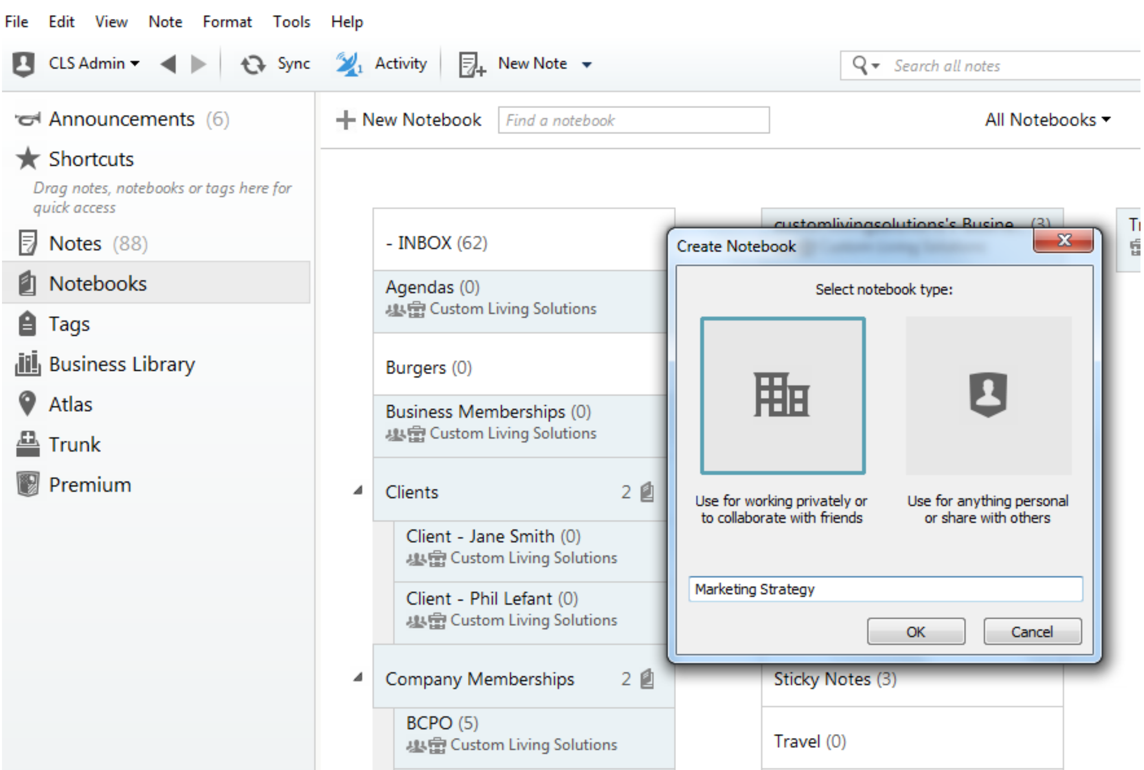
Working Together

Getting Everyone on the Same Page

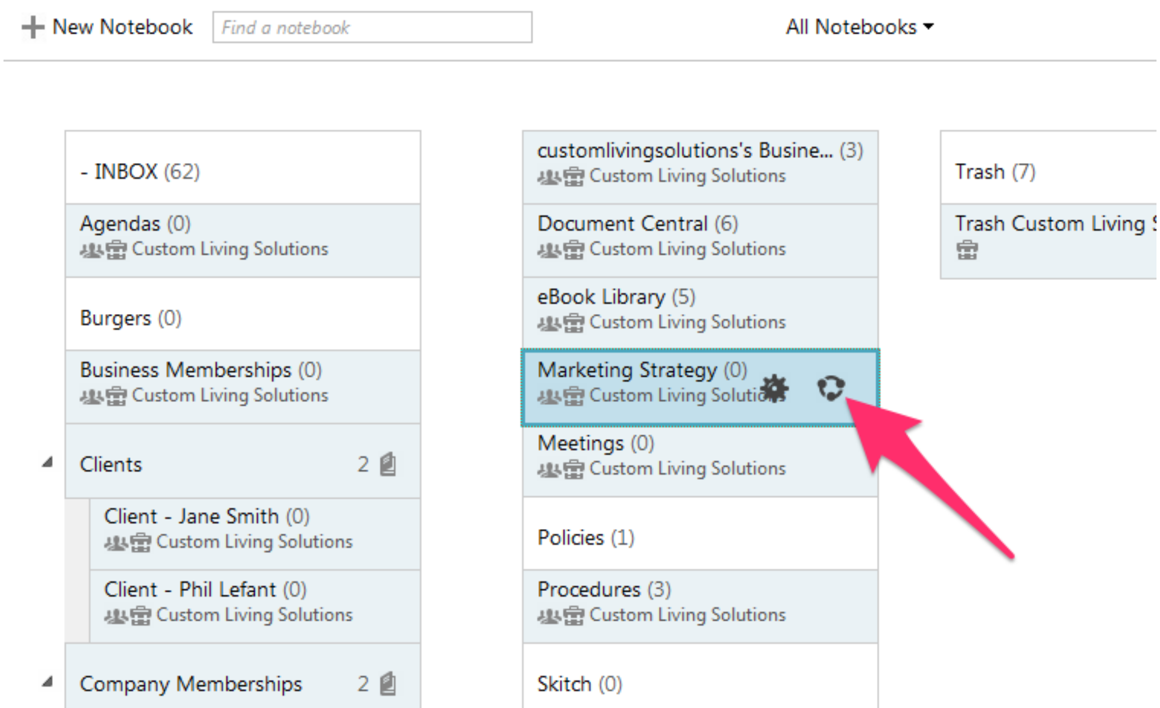
When you're working on a team, typically you do more than just have conversations - you probably share documents, collaborate on files, and more - all in service of getting your joint work done. Whether you work on internal projects or externally with clients or consultants, Evernote can help you centralize your projects and give you private spaces where you can share what you're working on with relevant parties. Not only that, but it can also help you keep track of what's going on in a given project.

Internally, Evernote can be a great tool for storing and sharing everything that's part of a project. By creating a shared notebook for each important project, selected team members can collaborate and communicate about what's going on without using a file server or exchanging yet another email.

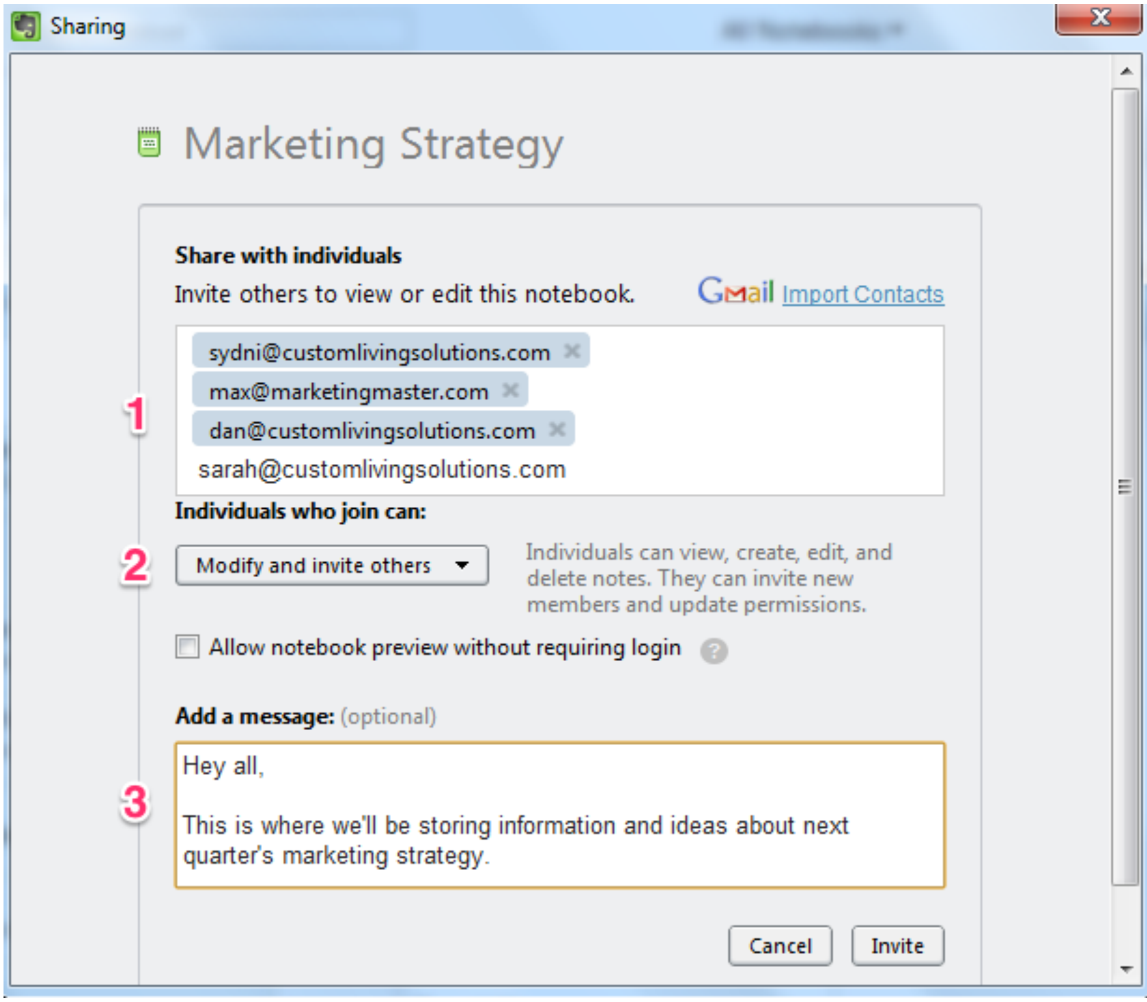
To show you how to do this for an internal project, let's use the example of collaborating on a new marketing strategy. First, create a new notebook called "Marketing Strategy."



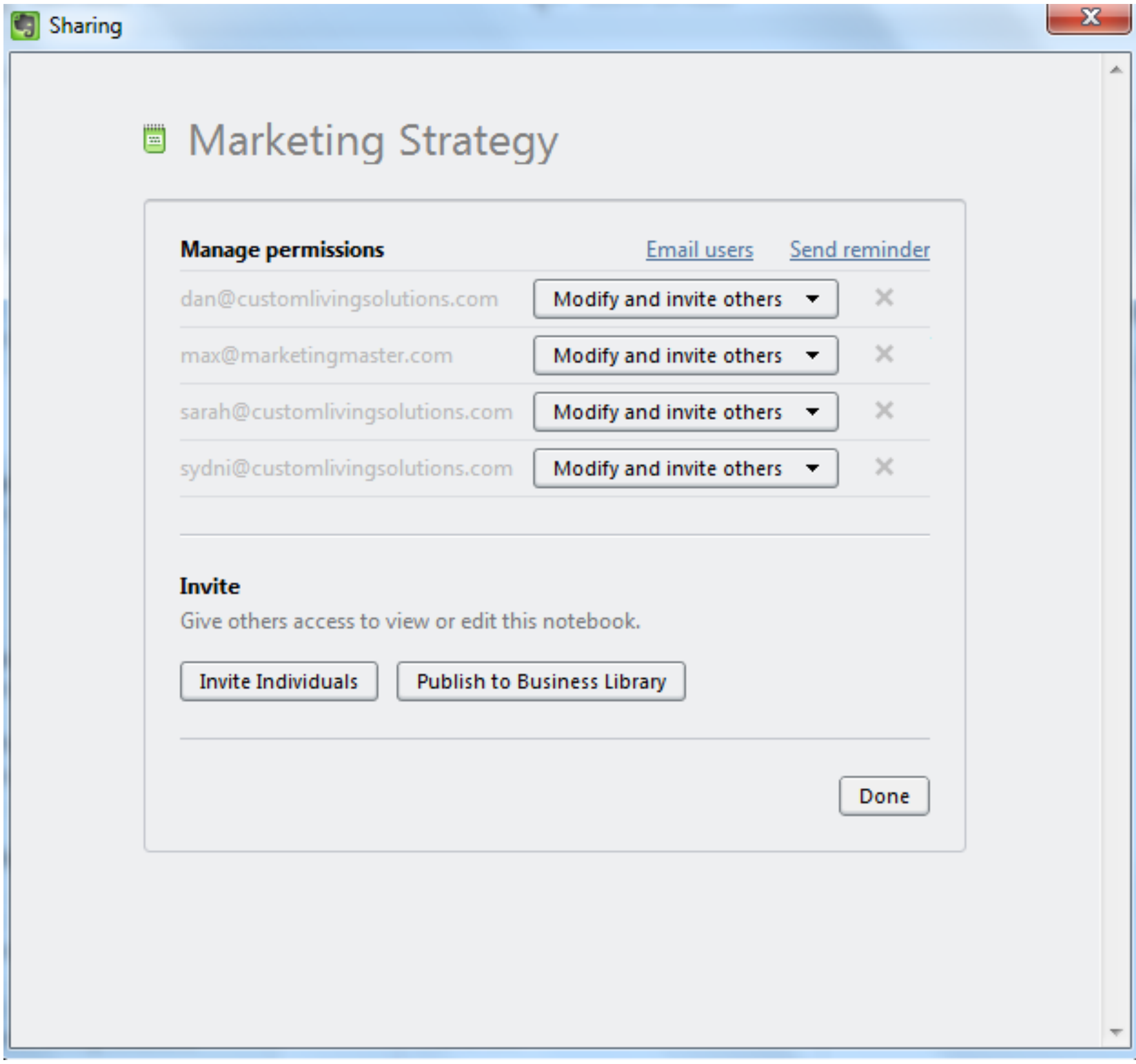
Now, let's add some collaborators from our company to share this notebook with. Click on the "Share" icon.



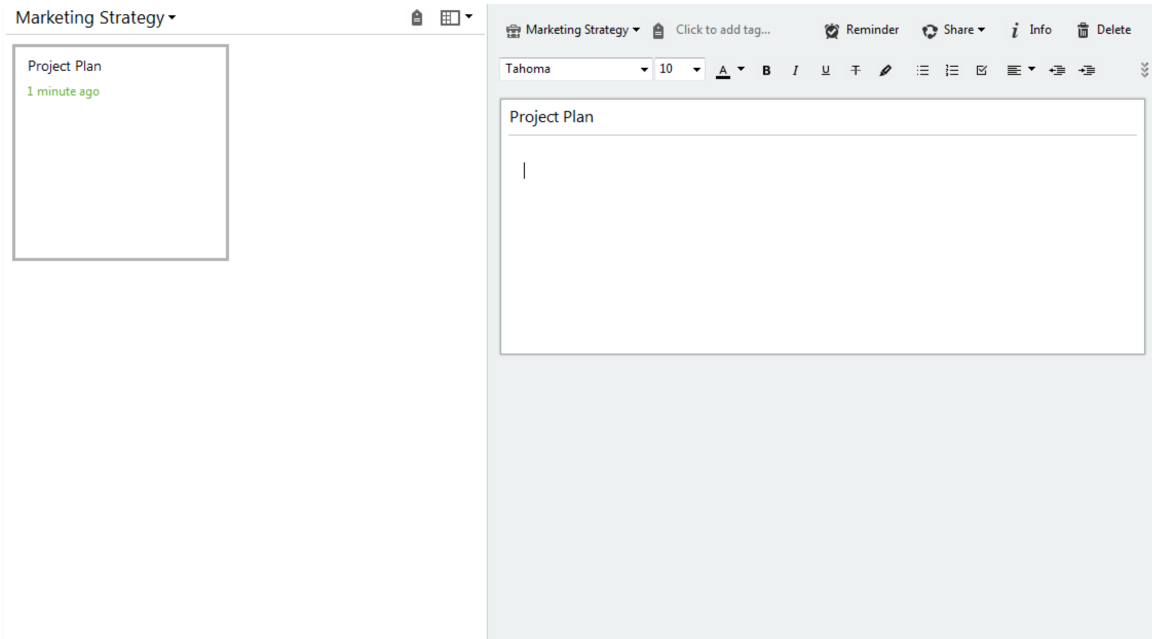
Since we want to share this notebook with a few people, we'll click on "Invite Individuals. In the pop-up window, I'll first invite specific people via email who I'd like to share this notebook with (1). Then, since we'll be collaborating on this notebook, I want to set the permissions so they are able to view and modify the notes in the notebook, and invite other collaborators as they see fit (2). Finally, I'll add a brief message with a description of this notebook (3), then I'll click the "Invite" button to send them the invitation.



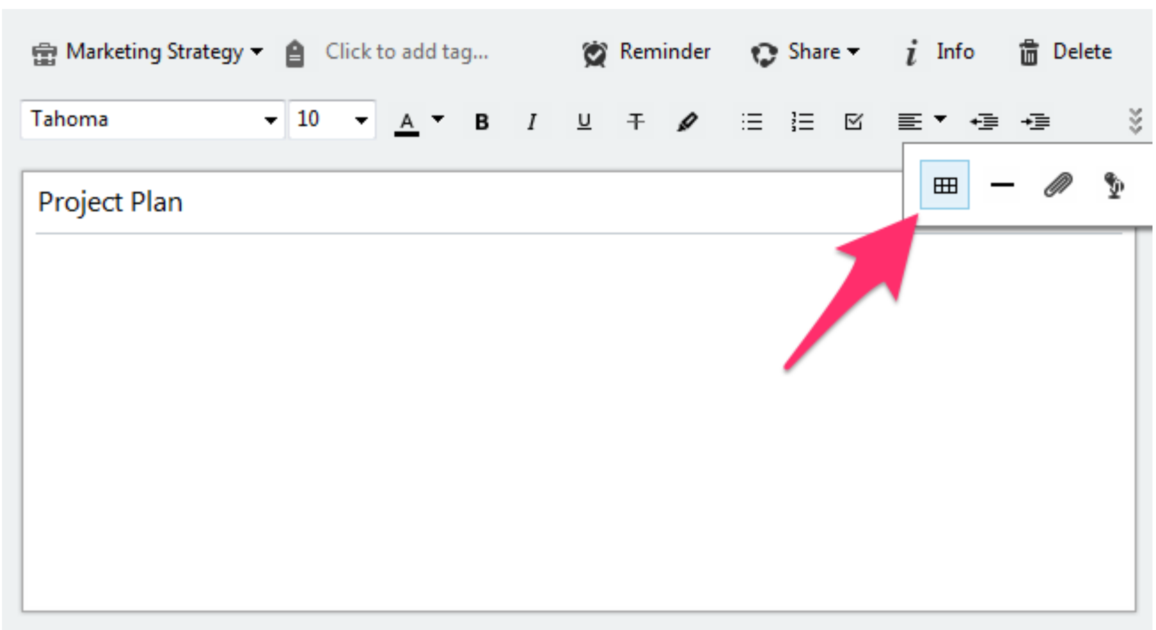
All the individuals I've invited and the their permissions are shown on the confirmation screen that follows.



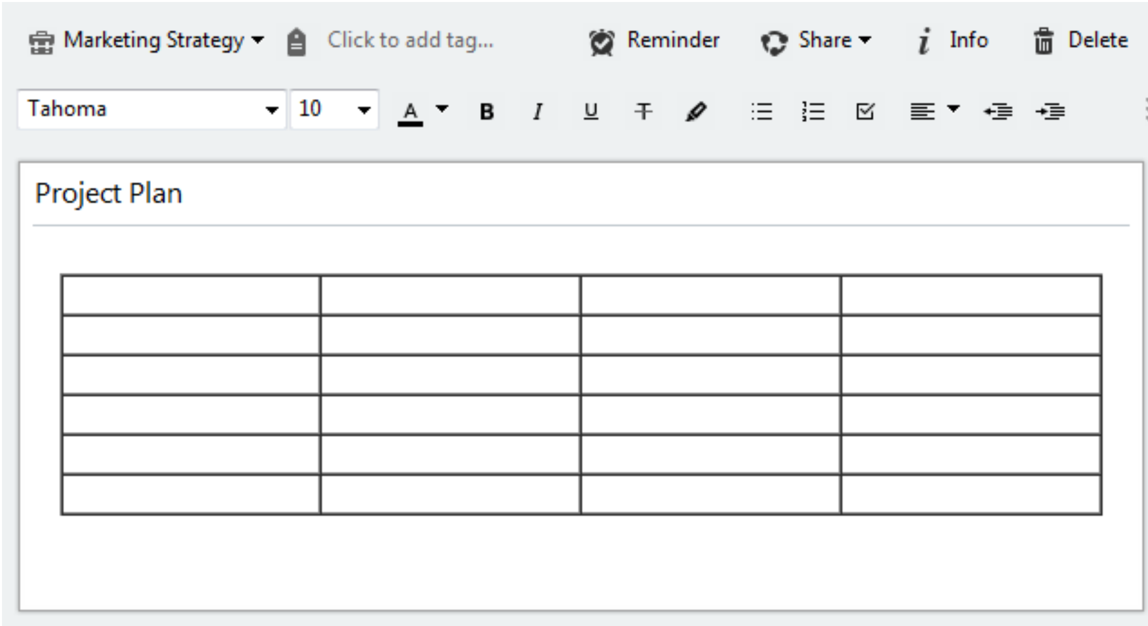
Now that the notebook is being shared with the team, it won't be of much use unless we start adding some content! Let's begin by opening the "Marketing Strategy" notebook, then let's add a new note titled "Project Plan." This is where we'll keep the details of the timeline for the project, who is responsible for what, and whether things have been completed.



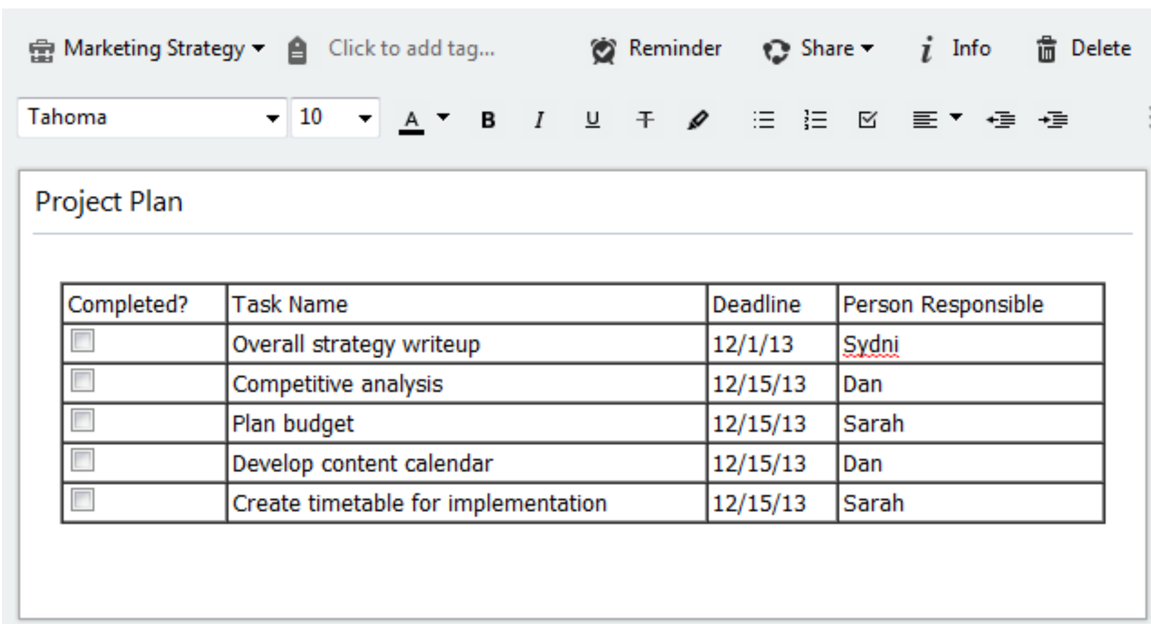
To keep things organized, we'll add a table to our note. That way, we can keep track of all the different elements that we want in an easy-to-read format. Click on the table icon to add a table.



Then we'll use the pop-up menu to create a table with 6 rows and 4 columns.



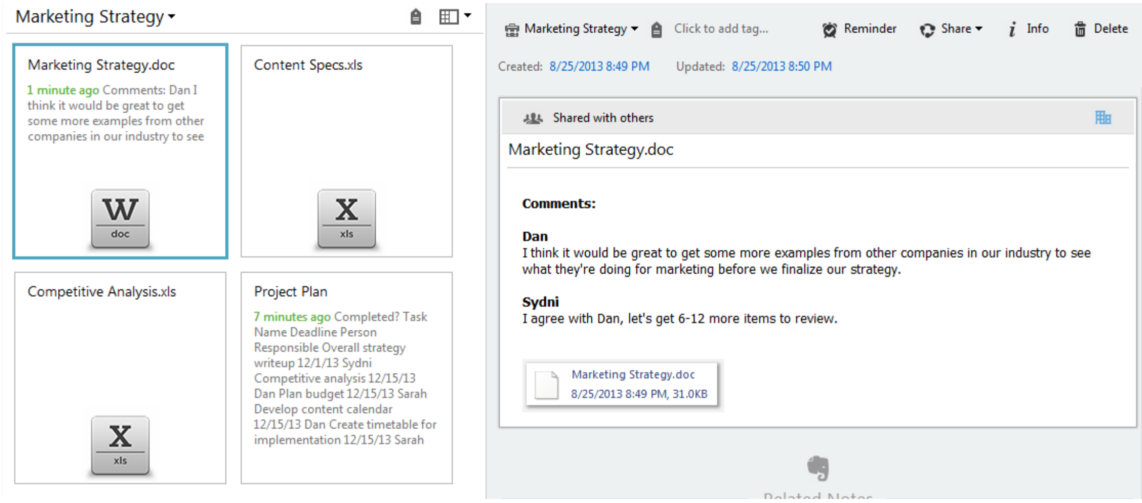
Let's fill it in with some data, including a checkbox to note task completion, and text for task name, deadline, and person responsible.



Completed?	Task Name	Deadline	Person Responsible
☐	Overall strategy writeup	12/1/13	Sydni
☐	Competitive analysis	12/15/13	Dan
☐	Plan budget	12/15/13	Sarah
☐	Develop content calendar	12/15/13	Dan
☐	Create timetable for implementation	12/15/13	Sarah

Now, the entire group working on this project can keep track of who is responsible for which task, when each is due, and whether they've been completed - all without sending status update emails back and forth.

Beyond keeping track of an overall project plan (or any task-related items, for that matter), you can also use notebooks to keep the actual documents that are parts of a project that you're working on. For instance, we can create notes for each of the docs that are part of the project plan, drag them into Evernote, and then use the note itself as the place to comment on the contents of a document.

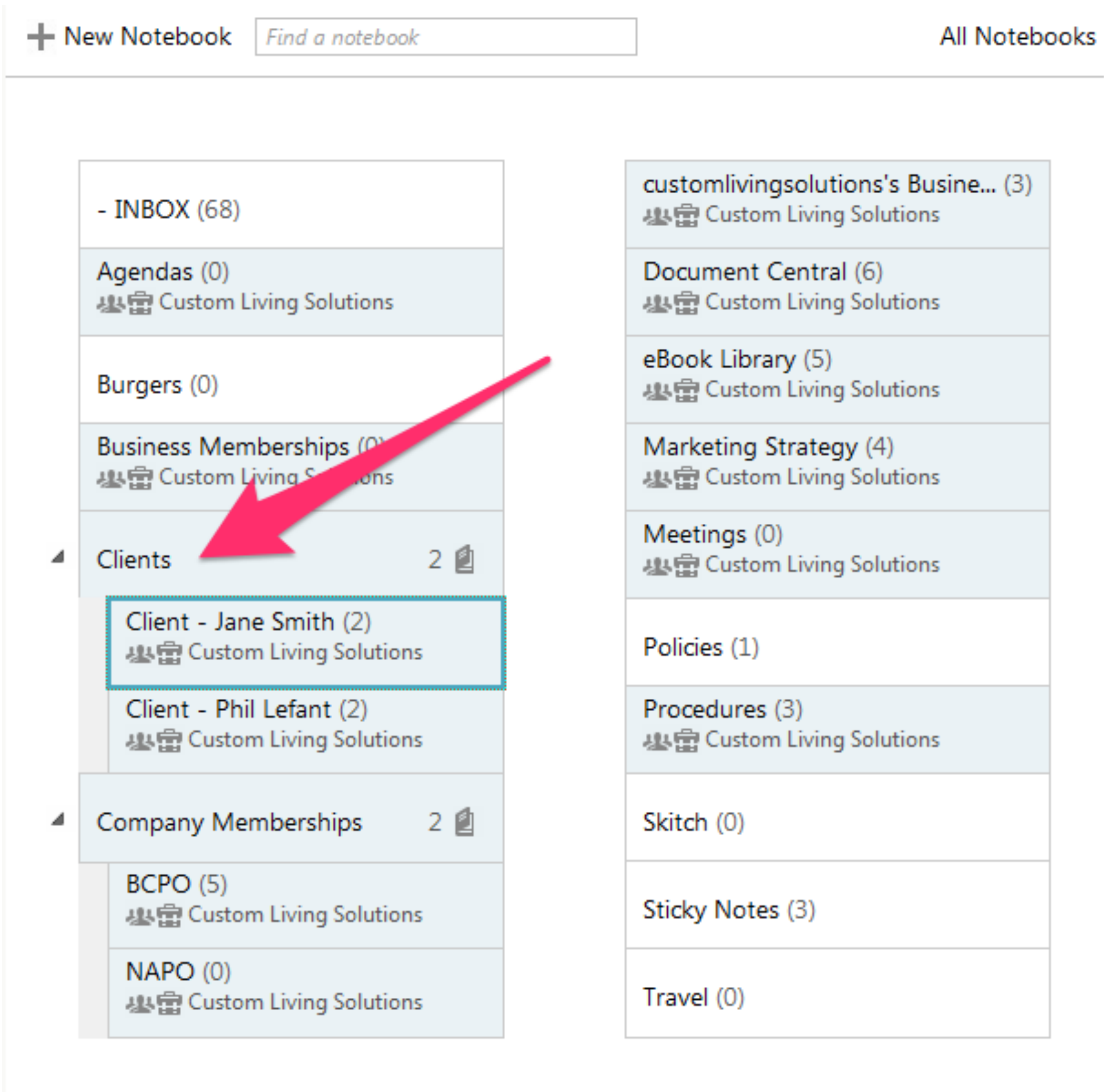


If you work with external clients or contractors and you need them to see a document you've worked on for them (or vice versa), chances are you're sending files back and forth via email or using an external project management app to do so. Rather than create another email or add yet another tool into the mix, let me show you how you can use Evernote to get both parties on the same page (literally).

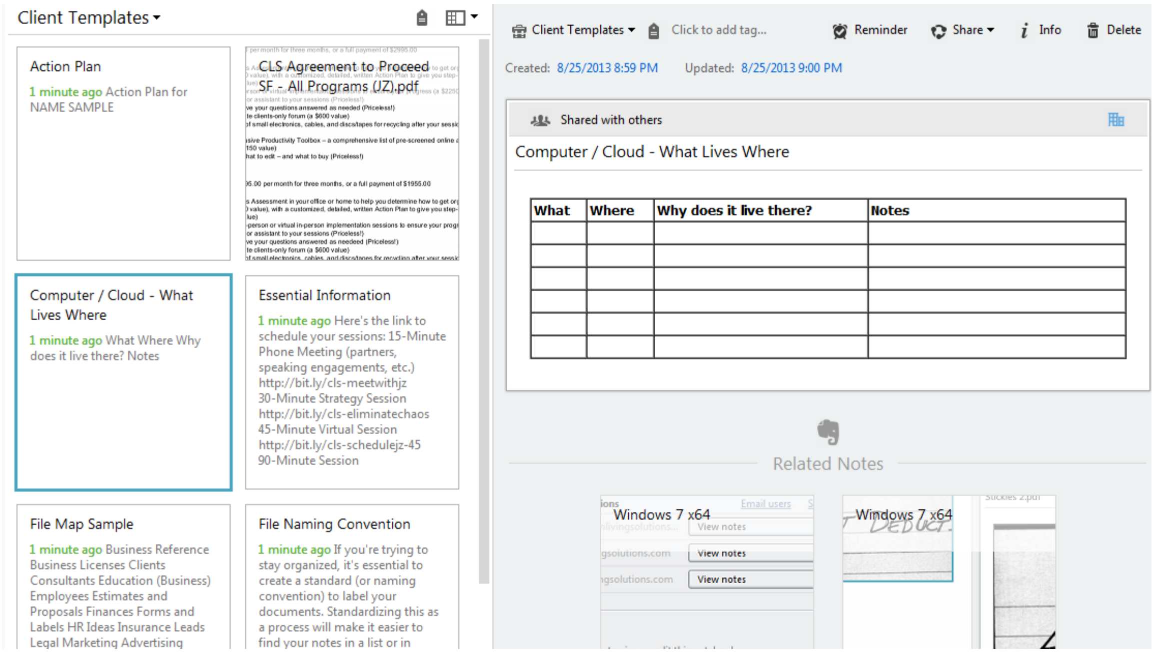
Since you can drag any kind of file into Evernote, using it to collaborate on projects, comment on them, and keep track of what's going on can make your entire team work more productively and efficiently. But this strategy isn't limited to working with your own team. If you collaborate with outside vendors or consultants, you can simply invite them to share the notebook with you and your team.

Evernote can help you collaborate with clients as well. Simply set up a notebook per client and share it with them. This can be a great place to keep a copy of your contract or agreement with them, any notes about your work together, the details of projects you're collaborating on (including files, timelines, and responsibilities), and more.

For example, I've set up notebooks for each of my current clients, and have placed all of them in a "Clients" notebook stack to keep them organized.



I've also created a sample notebook called "Client Templates." In this notebook I keep templates for frequently-used notes, and when I need them for a particular client, I just copy them from the Client Templates to the notebook for that client.



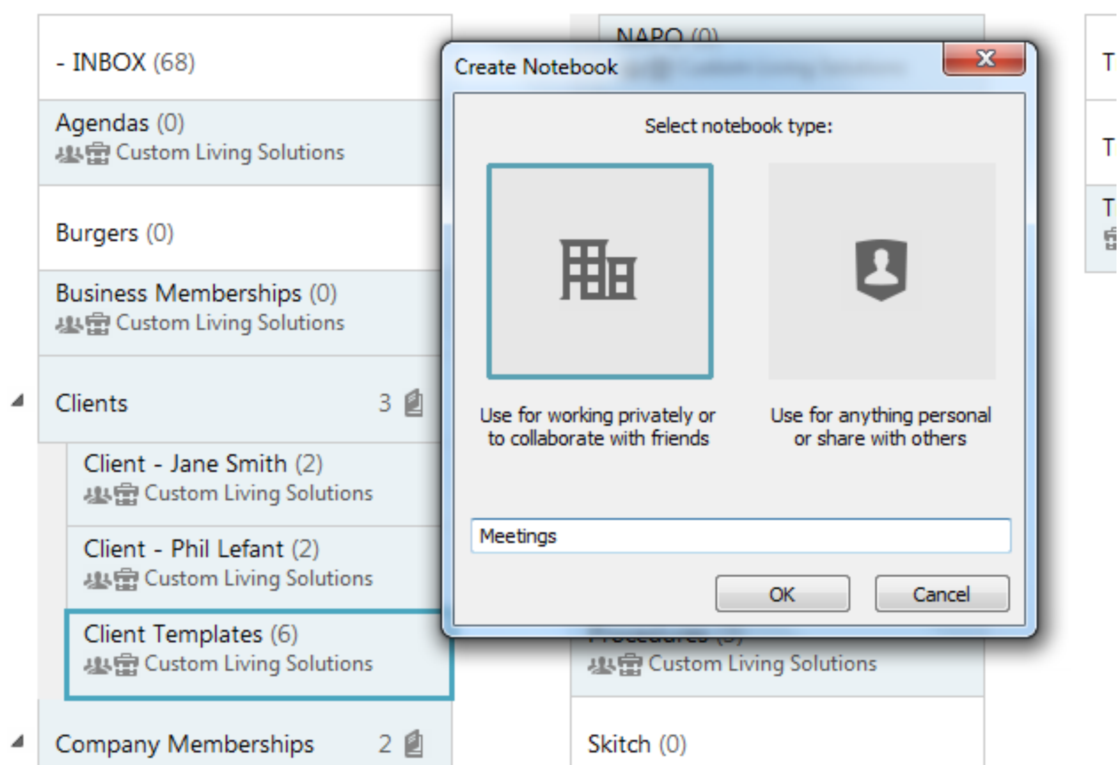
For both internal projects, as well as external projects, Evernote shared notebooks can streamline the process of working together. And who doesn't want that?

Mastering Meetings

It's a fact of modern business life - you're probably going to spend a chunk of your time in meetings. We can't make meetings go away, but we can use Evernote to make them more organized, more effective, and more actionable.

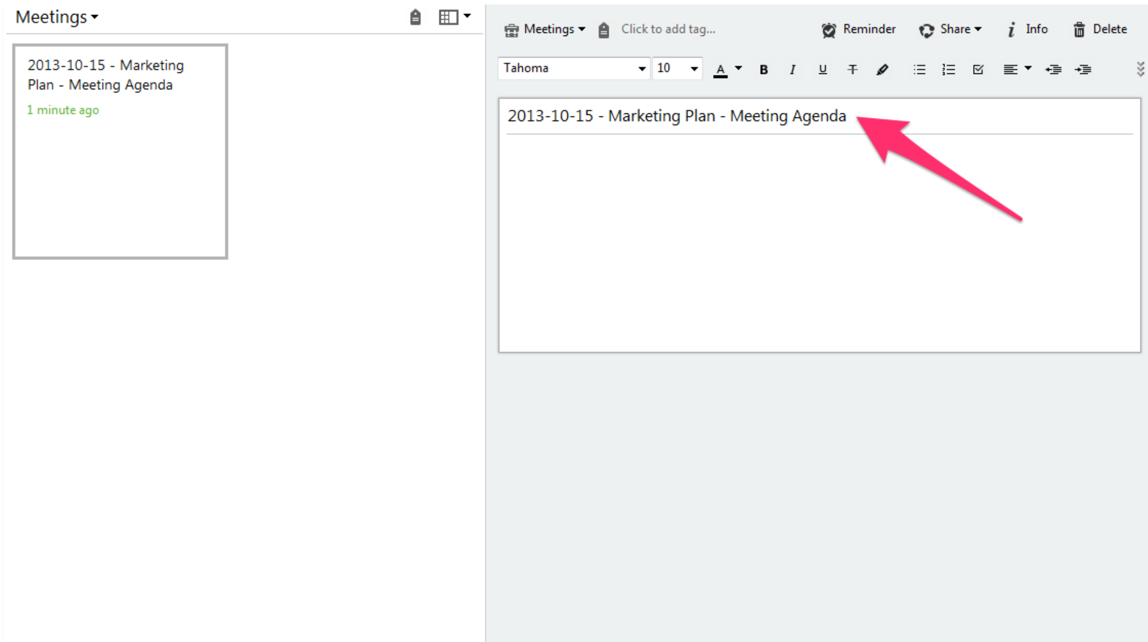
If a meeting is worth having, then it's worth creating an agenda for. Meetings without an agenda (and without clear follow-up items) typically leave attendees feeling like they're talking in circles, and everyone's time gets wasted. Fortunately, Evernote is a great place to create and share meeting agendas, along with any notes and follow-up items.

Start by creating a new notebook and naming it "Meetings."

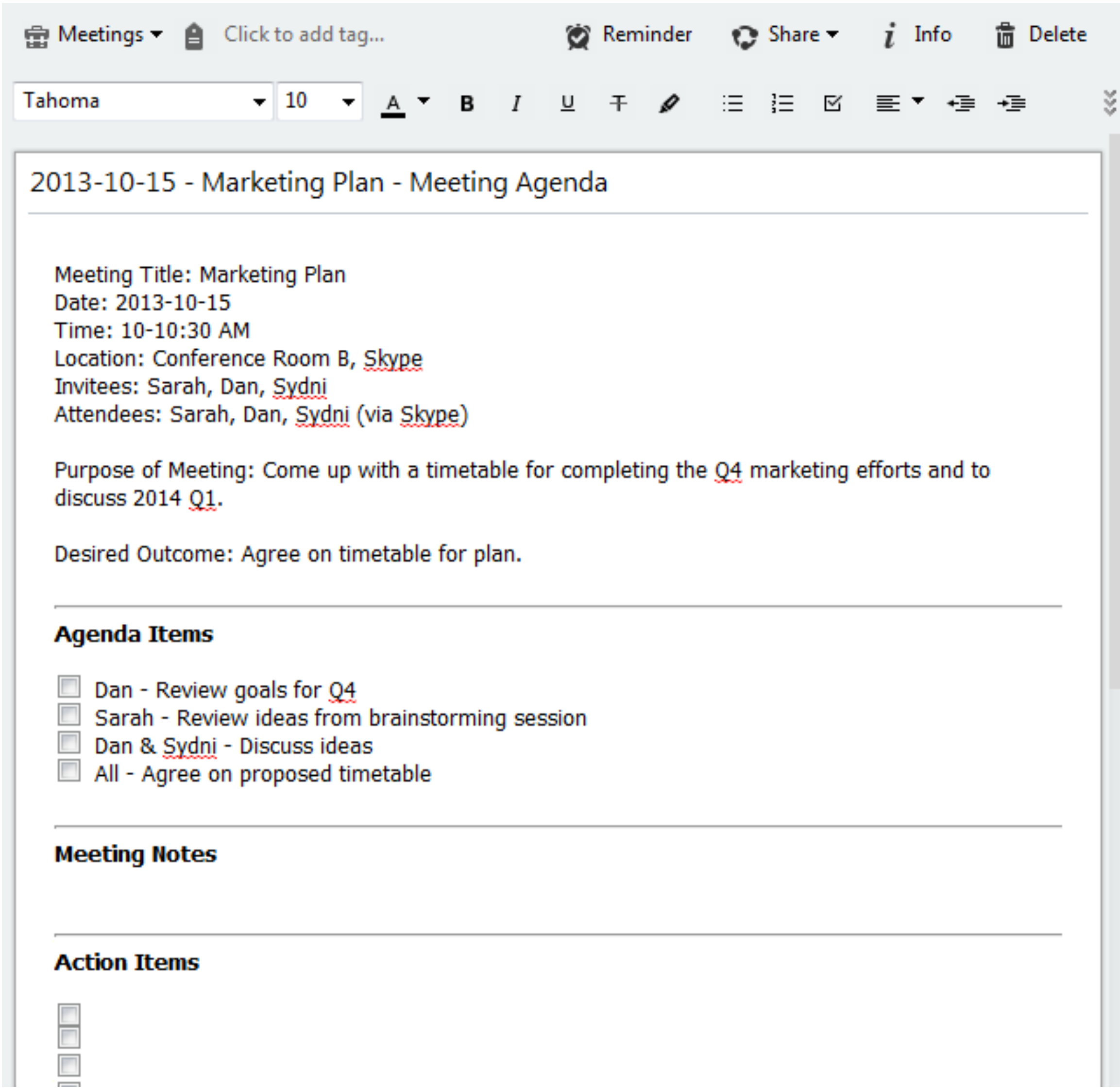


Since you probably won't have meetings with exactly the same people every single time, we won't share this notebook. Instead, we'll share individual notes within the notebook with the people who are part of a particular meeting.

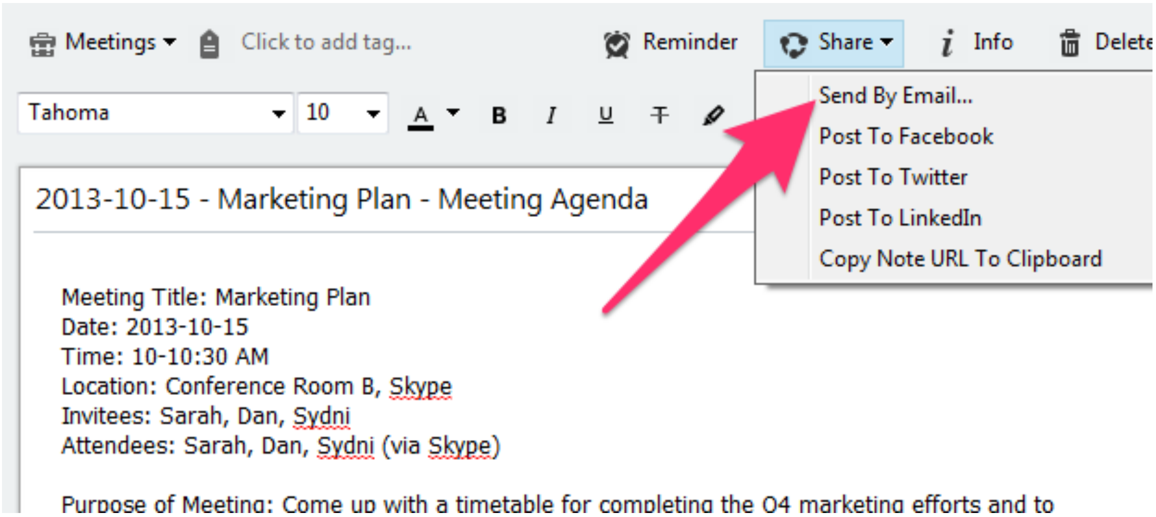
Let's start by creating a blank note within the "Meetings" notebook, and we'll call it "2013-10-15 - Marketing Plan - Meeting Agenda." By having this descriptive of a title, we'll know just by looking at the title what this meeting was about and when it occurred.



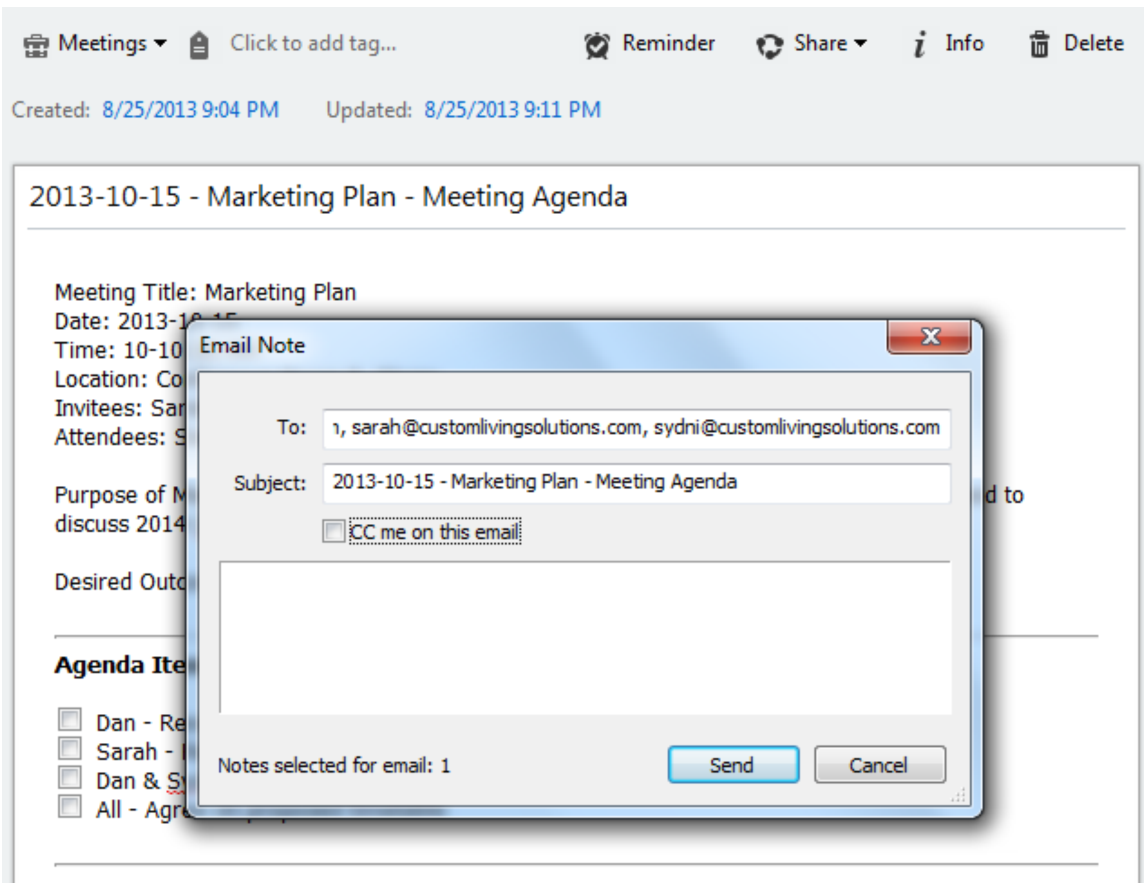
Any effective agenda has the details of a meeting (location, attendees, etc.) along with what's to be discussed, notes from the meeting, and who is going to be responsible for specific action items after the meeting concludes. Let's flesh out our meeting's agenda with some of this information.



Once the agenda has been created, then it needs to be shared with the people who are invited to the meeting. Click the "Share" button, and we can invite them via email.



In the pop-up window, I'll just enter the email addresses of the invitees to the meeting. They'll each receive a link to the note with the agenda.

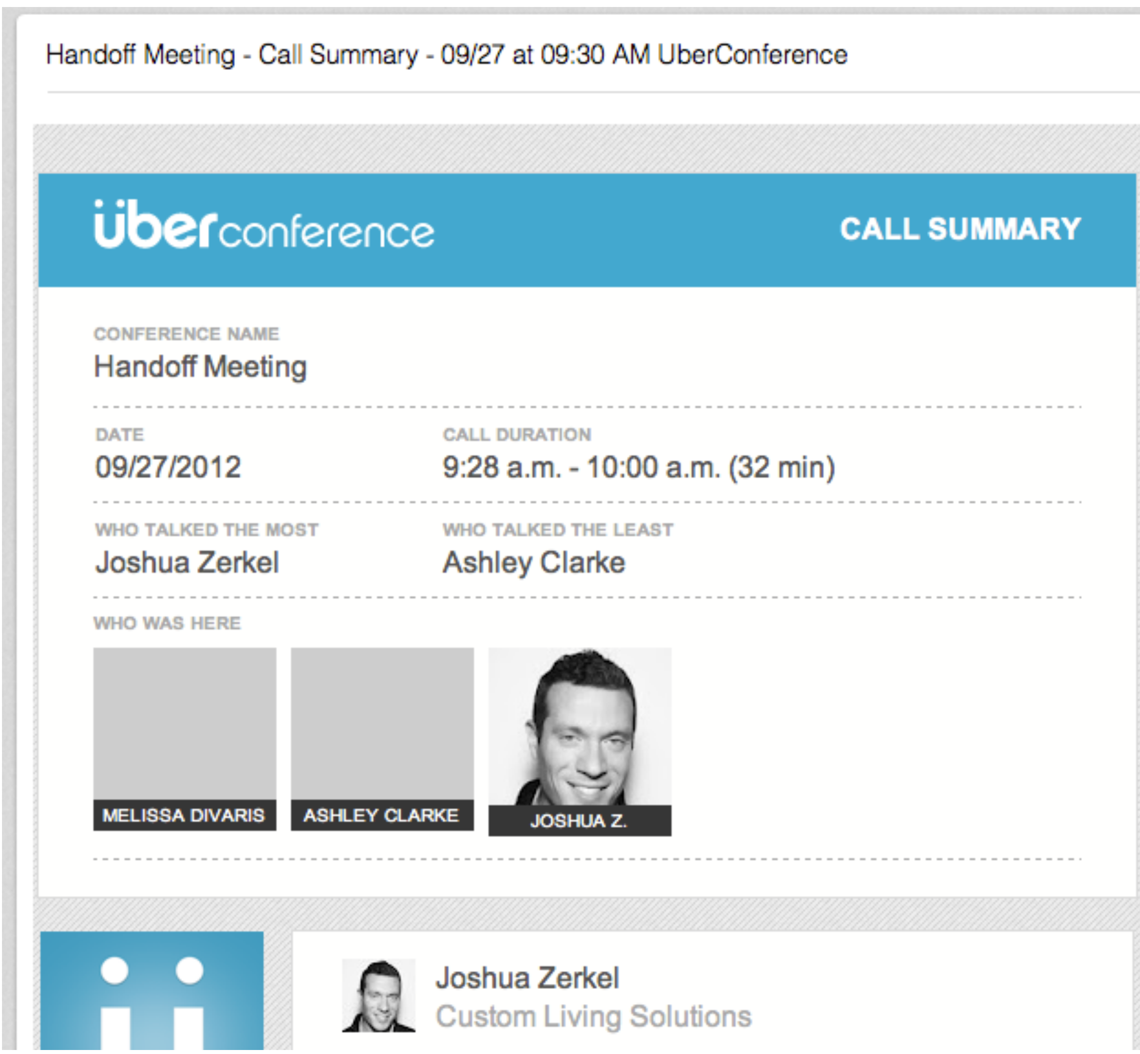


At the meeting, make sure one person is designated as the one who is responsible for updating the agenda, taking notes, and recording any action items. This will be a new practice for some, but will make your meetings much more effective and worthwhile.

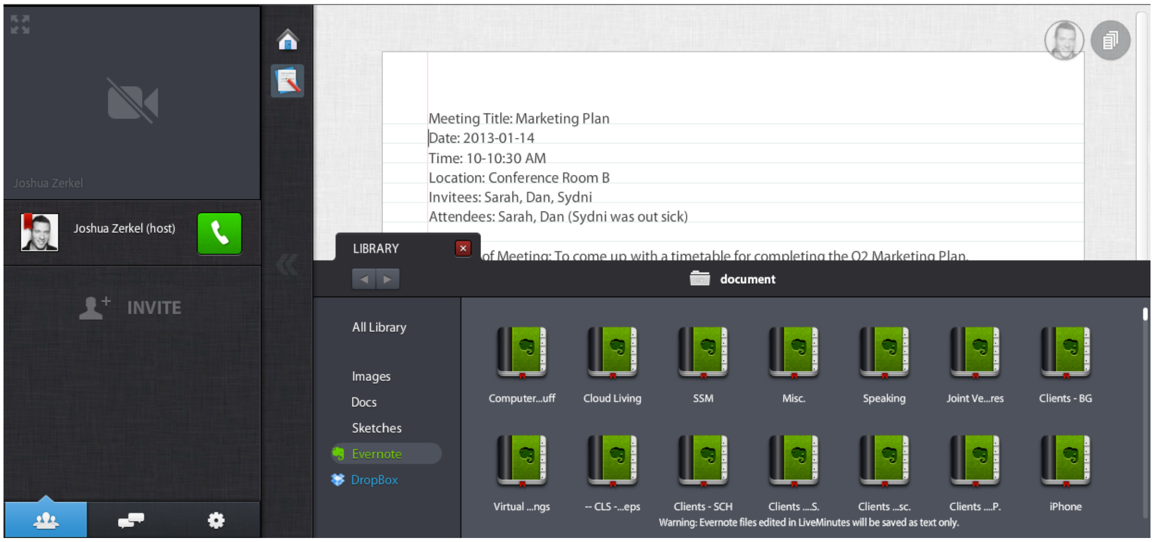
In the Appendix, I've created a sample meeting agenda that you can use as a starting point for your own meetings.

In addition to using Evernote to keep track of your agendas, tools that integrate with Evernote can help you keep your meetings on track.

UberConference works best for meetings that are held via phone. When you sign up for UberConference, you'll receive a call-in number that you can use for your conferences. You can set up and monitor your conferences via a web control panel, and when you meeting is over, a meeting summary (along with interesting info like who spoke the most - and who didn't) is automatically placed into your Evernote account.



In addition to providing audio and video conferencing, LiveMinutes lets you and your meeting attendees collaborate directly on a single Evernote note (such as an agenda, or meeting minutes), then automatically syncs those notes back into your Evernote account. This can be a great way to take "shared notes" during a meeting. You can also bring your Evernote notes directly into a LiveMinutes meeting and view and collaborate on them.



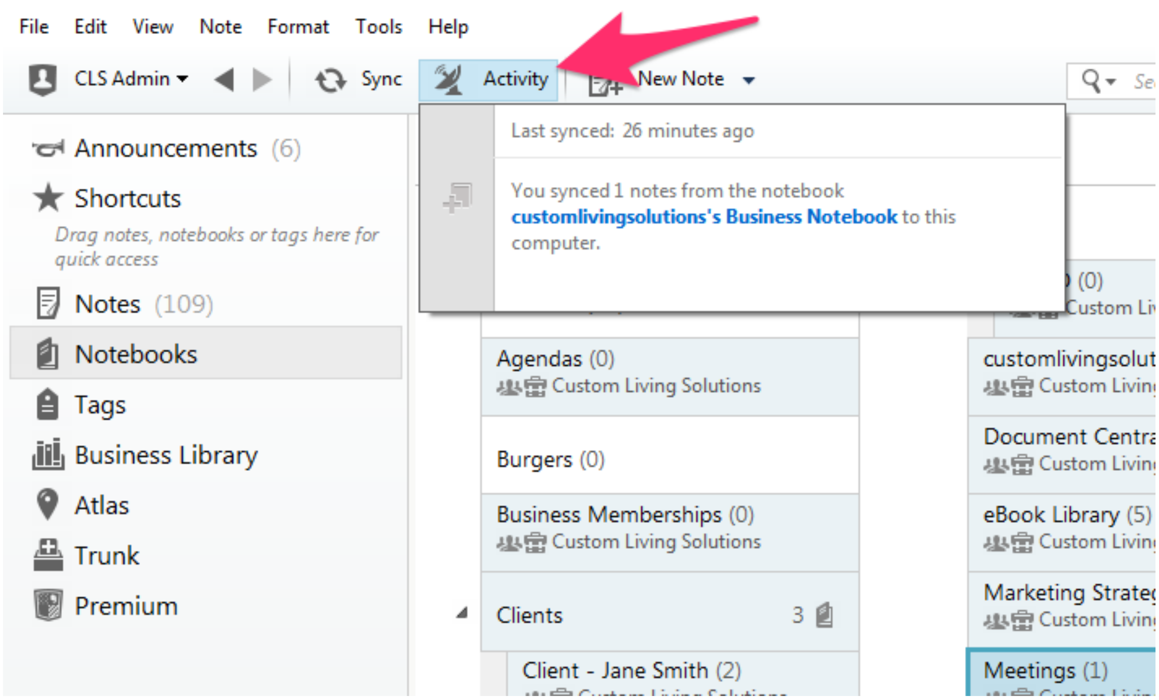
Keeping Up With the Action

If you, your team, and your clients or vendors are using Evernote to centralize and store information, agendas, files, and more, it's going to be increasingly important that everyone stays up-to-date with, well, the updates and changes that everyone else is making in the notebooks that they're working in. There are two ways to do this:

Method 1 - Go into each and every notebook and look for notes that have been updated or changed. Yes, this could take a long time, which is why I suggest...

Method 2 - Use Evernote's Activity Stream to do the monitoring for you!

The Activity Stream monitors what is going on in all of the notes and notebooks that are part of your Evernote account and that are shared with you. Simply click on the Activity Stream icon and you'll see a pop-down window with all of the changes and updates (and who made them), what notebooks or notes were affected, and when changes occurred.



Build a regular practice of checking the Activity Stream to make sure you're not left behind on changes that are happening across your notebooks!

Working Together – Action Plan

In this section, *Working Together,* you learned how to:

- Keep track of what you and your team are working on
- Create centralized spaces for storing and collaborating on projects with your team and/or with clients
- Master your meetings with shared agendas
- Keep track of what's going on across your notebooks by using Activity Stream

Now it's time to take action!

What do you need to do or put into place to start using Evernote to collaborate with your team, vendors, or clients?

What is the first thing that should be accomplished?

Who would be responsible for implementing that?

What tools are needed to complete the task?

What is the deadline for getting this implemented?

Who will verify that this has been completed?

Part 4

Spreading the Word

Marketing Calendar, Wherefore Art Thou?

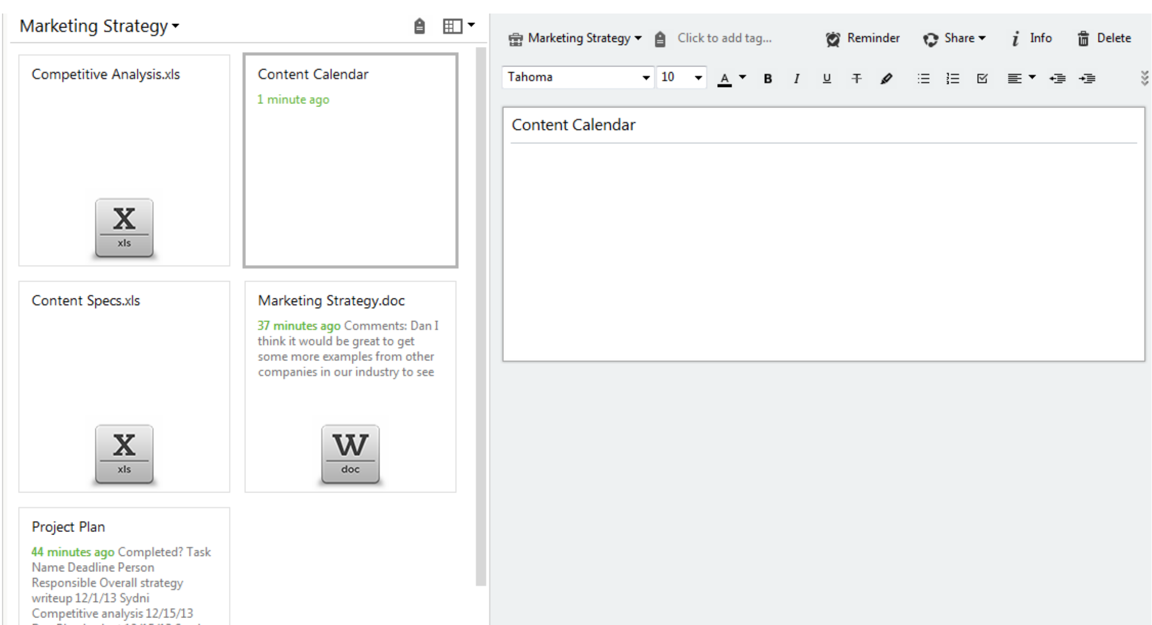
As you've seen in previous chapters, Evernote is great for mastering internal processes and streamlining your company's workflow. But without spreading the word about your products or services, there won't be any work to do!

Luckily, there are some great ways you can use Evernote to help with your marketing efforts. It's often helpful to make sure everyone on your team is aware of what marketing efforts are happening so they can stay abreast of current trends, and at the very least, do what they can to participate and help.

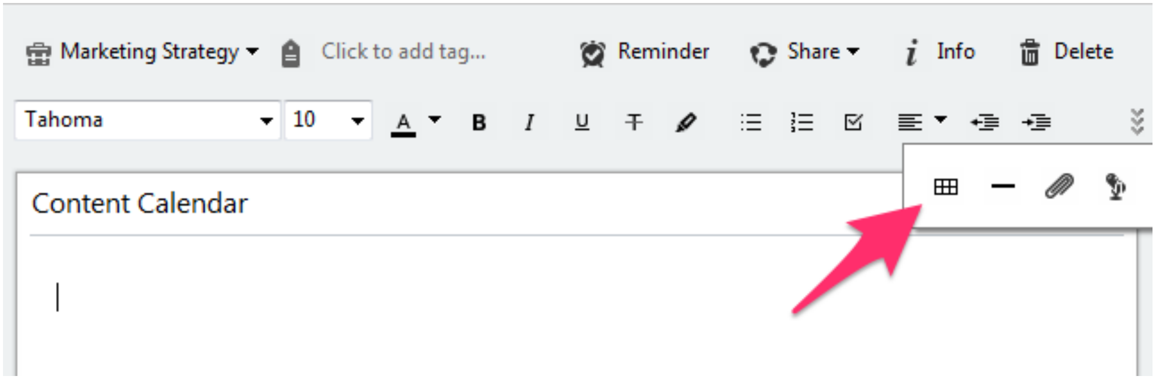
In *Chapter 18 - Getting Everyone on the Same Page*, we created a Marketing Strategy notebook that we shared with specific people on our team. In such a notebook, you could add in your marketing plan, competitive analysis, and other information that can help let your team know what's going on with your marketing strategy.

One key item that's a part of the marketing strategy for many of today's businesses is content marketing - where you create information that's of interest to the people in your target marketing, such as blog posts, videos, and posting on social media. Rather than taking a haphazard approach to this element of your marketing, it's much better to plan in advance, and keep everything organized with a marketing calendar. That's where Evernote comes in.

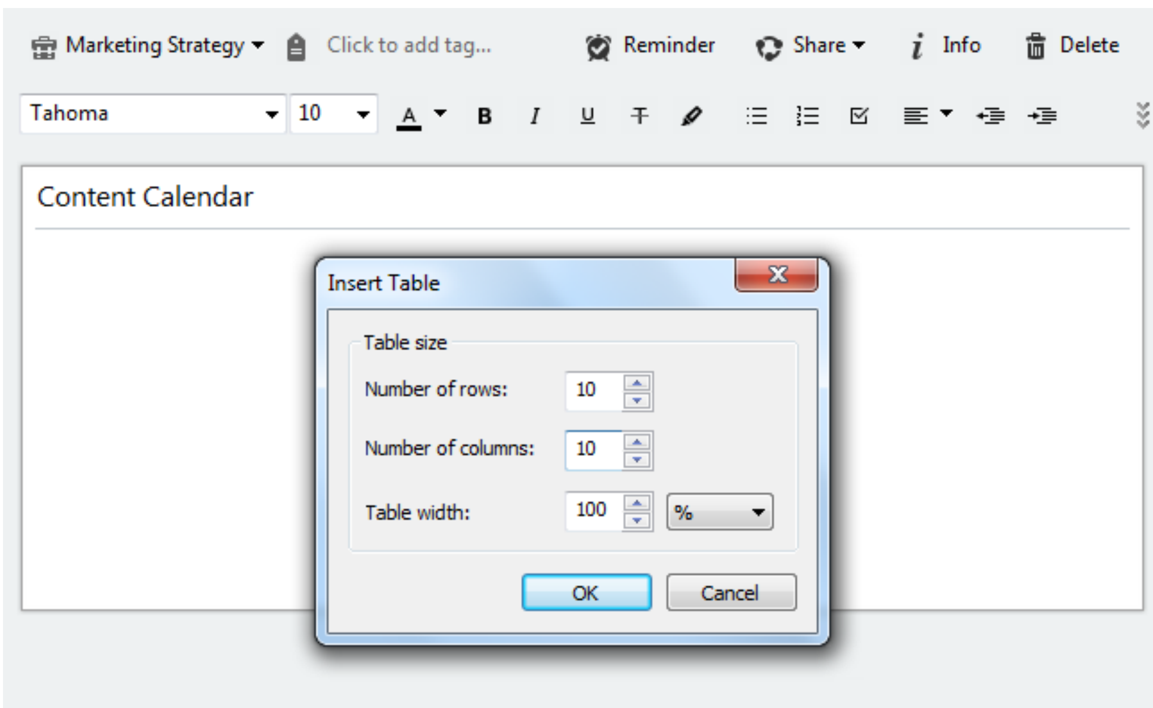
Let's open up the “Marketing Strategy” notebook that we created previously, and then add a new note called "Content Calendar."



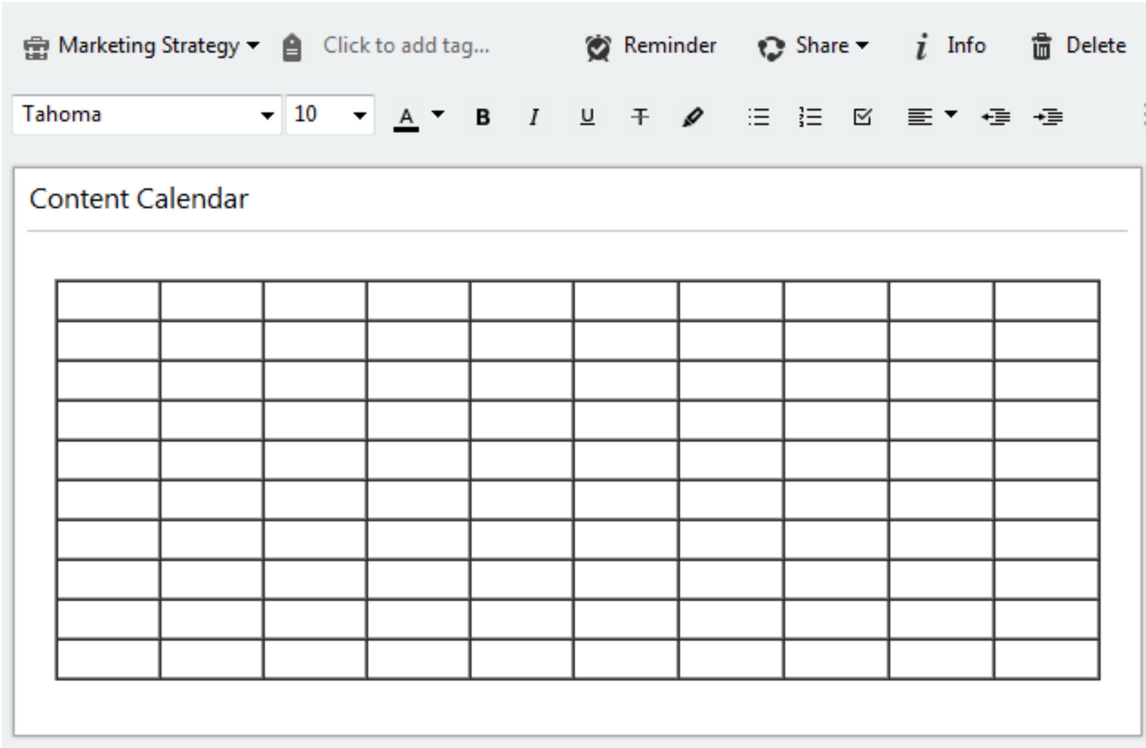
To keep track of our monthly topics, posts, and other marketing activities, we'll create a table. Click on the table icon.



Let's add a table with 10 rows and 10 columns. You can always add more rows or columns later if you need them.

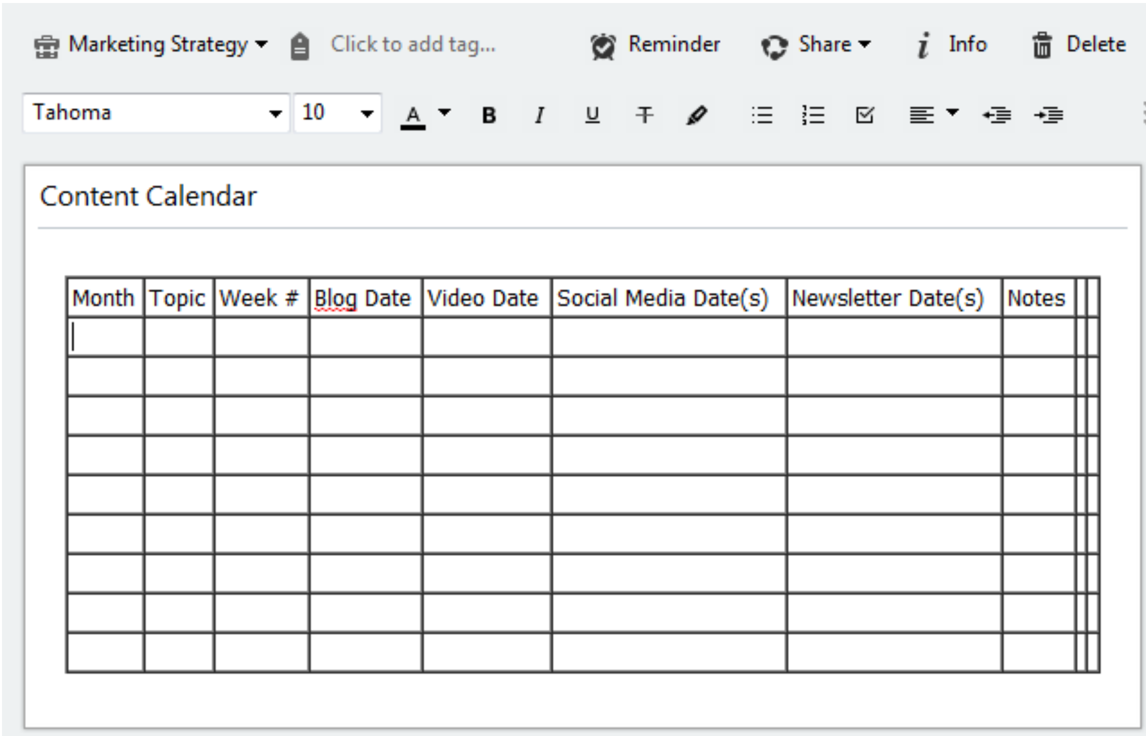


Now you'll see a blank table with empty rows and columns.



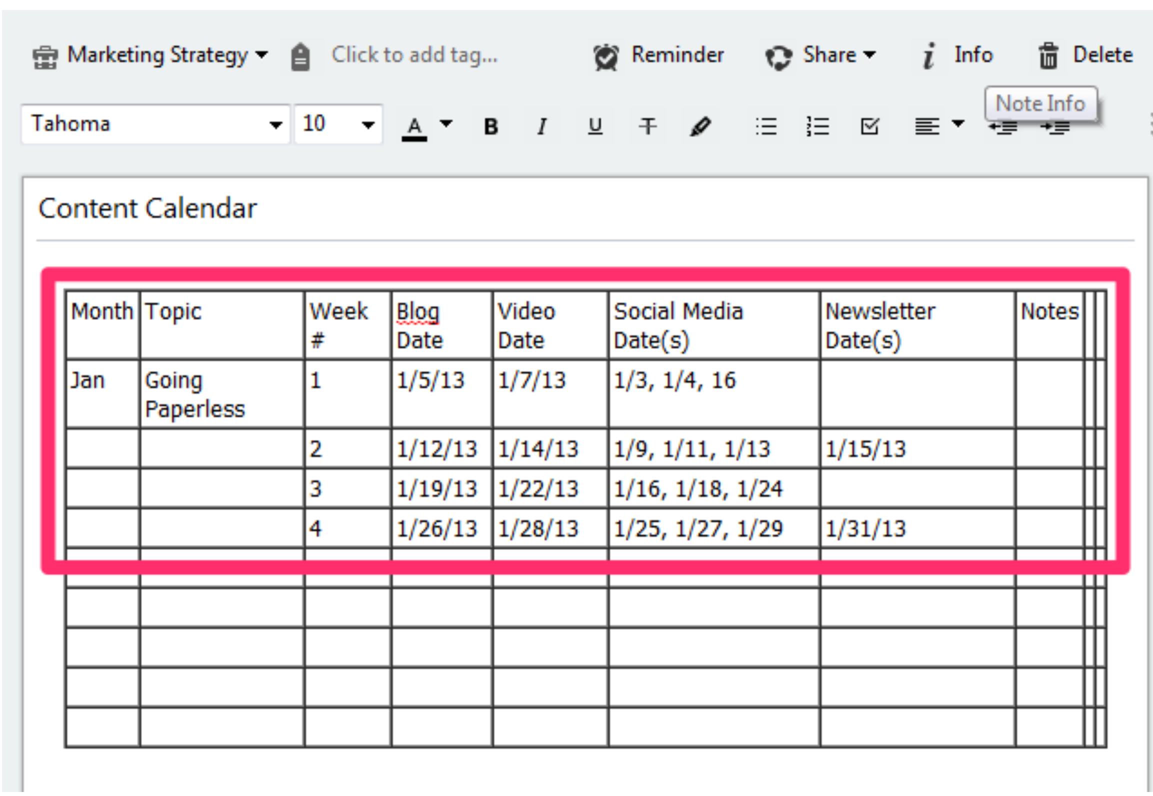
Now let's fill in the table with some useful information to keep track of your marketing efforts. Some of the things you might want to keep track of with a content calendar might include:

- Month
- Topic
- Week #
- Blog Date
- Video Date
- Social Media Dates
- Newsletter Date
- Notes



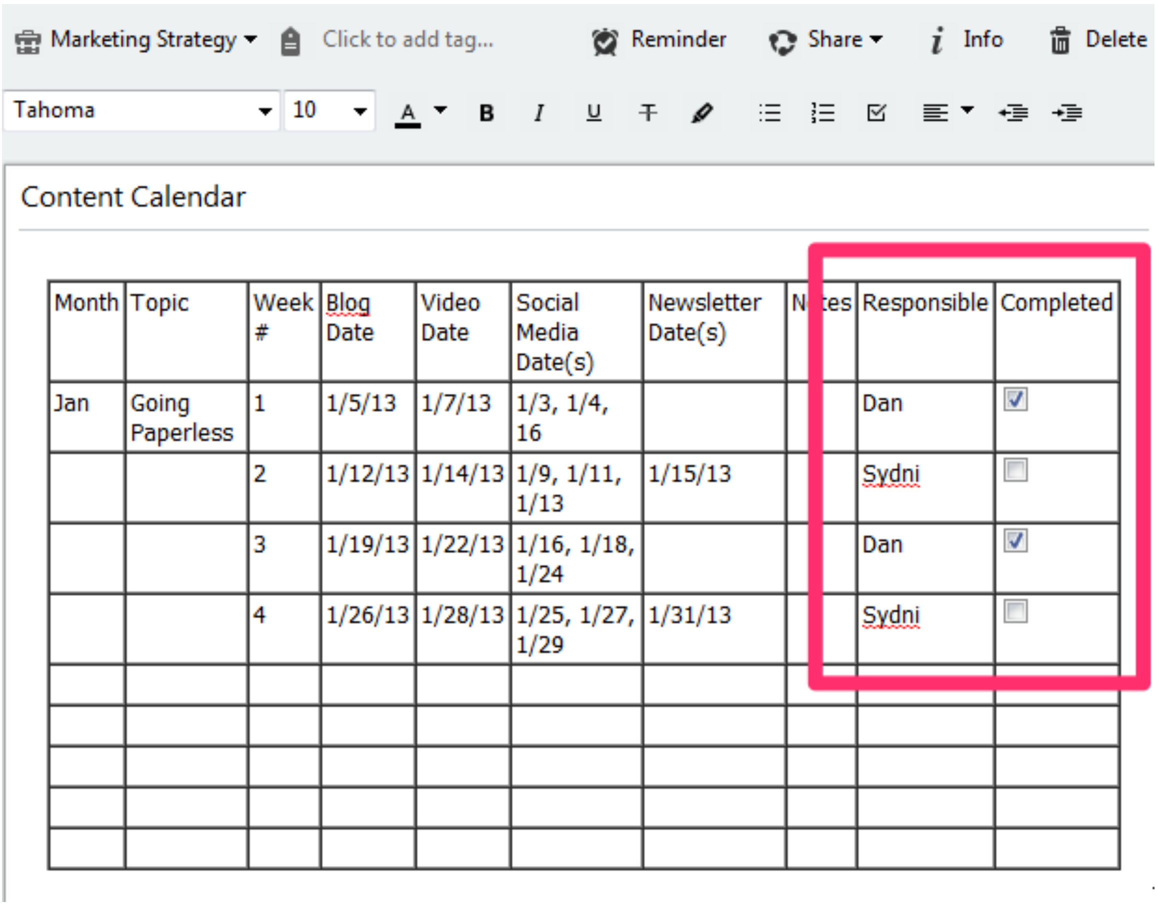
Month	Topic	Week #	Blog Date	Video Date	Social Media Date(s)	Newsletter Date(s)	Notes		

We have a couple of extra columns on the right that are currently empty, but let's leave them - maybe they'll come in handy later. Let's fill out the rest of the table with information on our marketing efforts for January.



Month	Topic	Week #	Blog Date	Video Date	Social Media Date(s)	Newsletter Date(s)	Notes		
Jan	Going Paperless	1	1/5/13	1/7/13	1/3, 1/4, 16				
		2	1/12/13	1/14/13	1/9, 1/11, 1/13	1/15/13			
		3	1/19/13	1/22/13	1/16, 1/18, 1/24				
		4	1/26/13	1/28/13	1/25, 1/27, 1/29	1/31/13			

If different people are responsible for producing different elements of your content, use the remaining columns to note who is responsible and whether their tasks have been completed.



Month	Topic	Week #	Blog Date	Video Date	Social Media Date(s)	Newsletter Date(s)	Notes	Responsible	Completed
Jan	Going Paperless	1	1/5/13	1/7/13	1/3, 1/4, 16			Dan	☑
		2	1/12/13	1/14/13	1/9, 1/11, 1/13	1/15/13		Sydni	☐
		3	1/19/13	1/22/13	1/16, 1/18, 1/24			Dan	☑
		4	1/26/13	1/28/13	1/25, 1/27, 1/29	1/31/13		Sydni	☐

Since marketing is typically an area with many projects and sub-projects, keeping track of what's happening with your marketing content is super-important. Especially if multiple people on your team are working on it, having a marketing calendar stored and shared in Evernote can keep everyone on track - and on task.

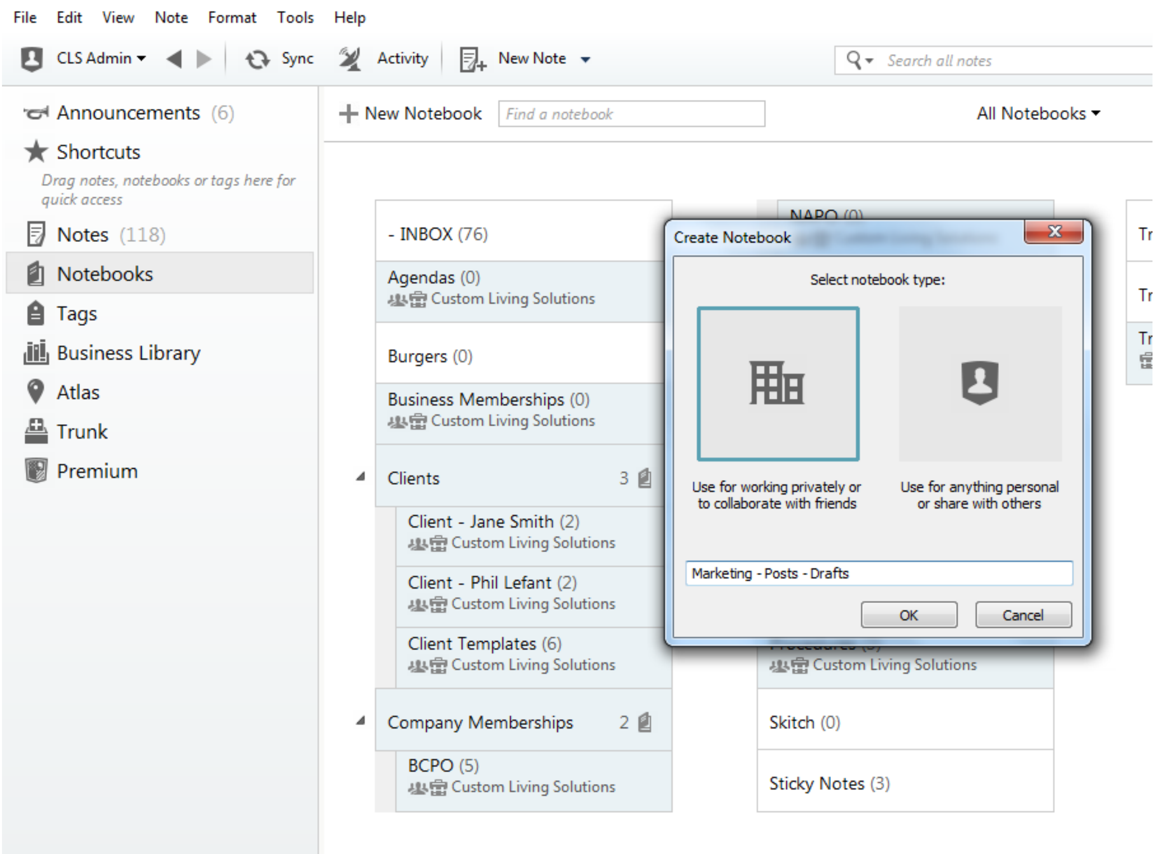
Keeping it Social – and Keeping it Permanently

If your team is doing content marketing (as outlined *Chapter 22 - Marketing Calendar, Wherfore Art Thou?*), your company is likely creating a lot of valuable posts, articles, videos, and blogs - and you don't want to lose track of them. In many companies, once content has been posted to the ether of the internet, it's basically out of your hands. But what if you, or someone on your team, wants to look up a tweet from a few months ago, a post on your company's Facebook wall, or a blog post from last March?

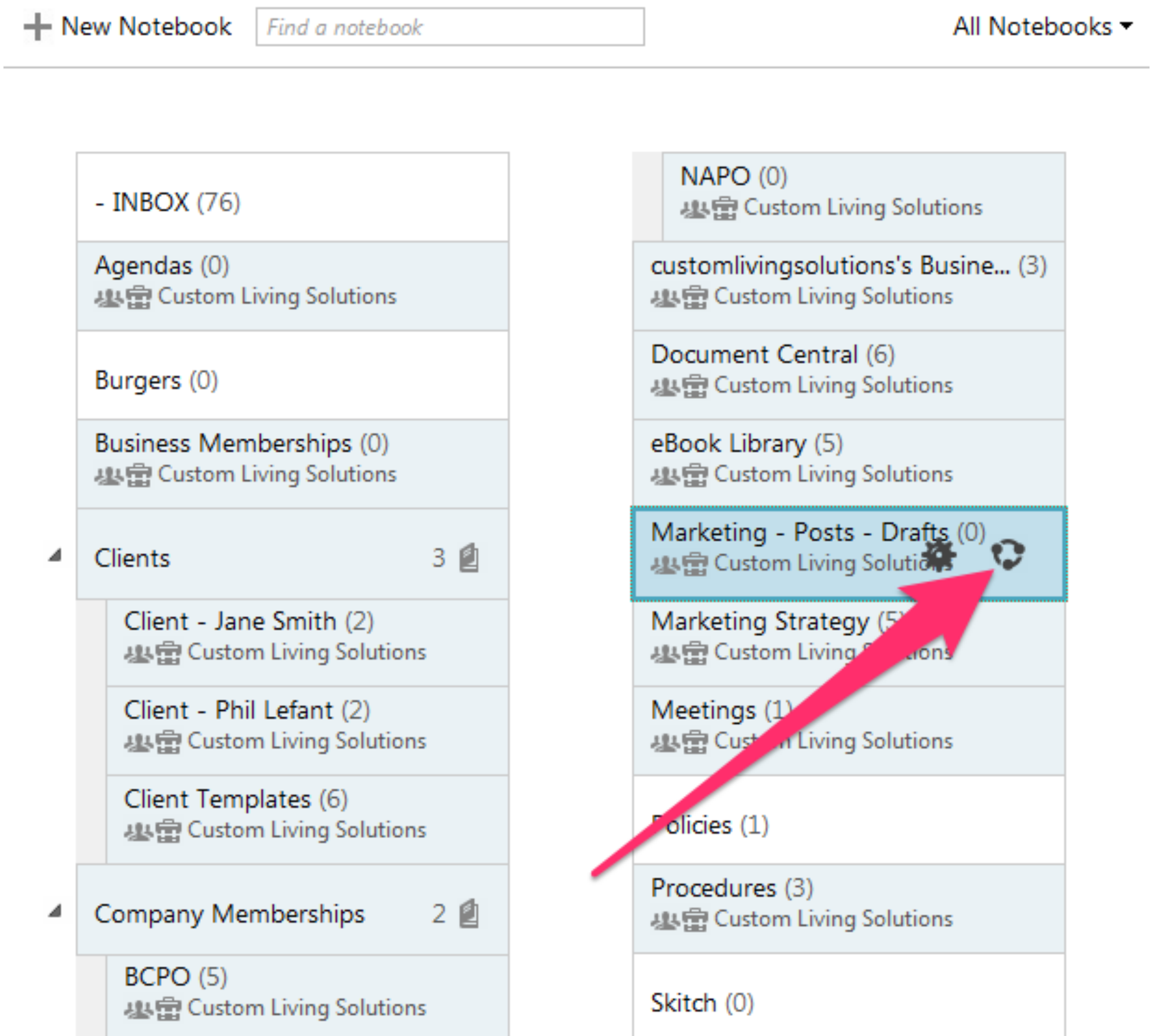
In most companies, there's no easy way to quickly find posts from the past. By using Evernote, we can create a repository for all of your social media and online marketing efforts. That way, when you or someone in your company needs to look something up (or if you just want to keep track of what's been posted for legal, historical, or other reasons), your company's online history will be centralized in one spot.

First, let's create a notebook for drafts. That way, as posts are being written, you have a central spot that the team can collaborate on what's getting created.

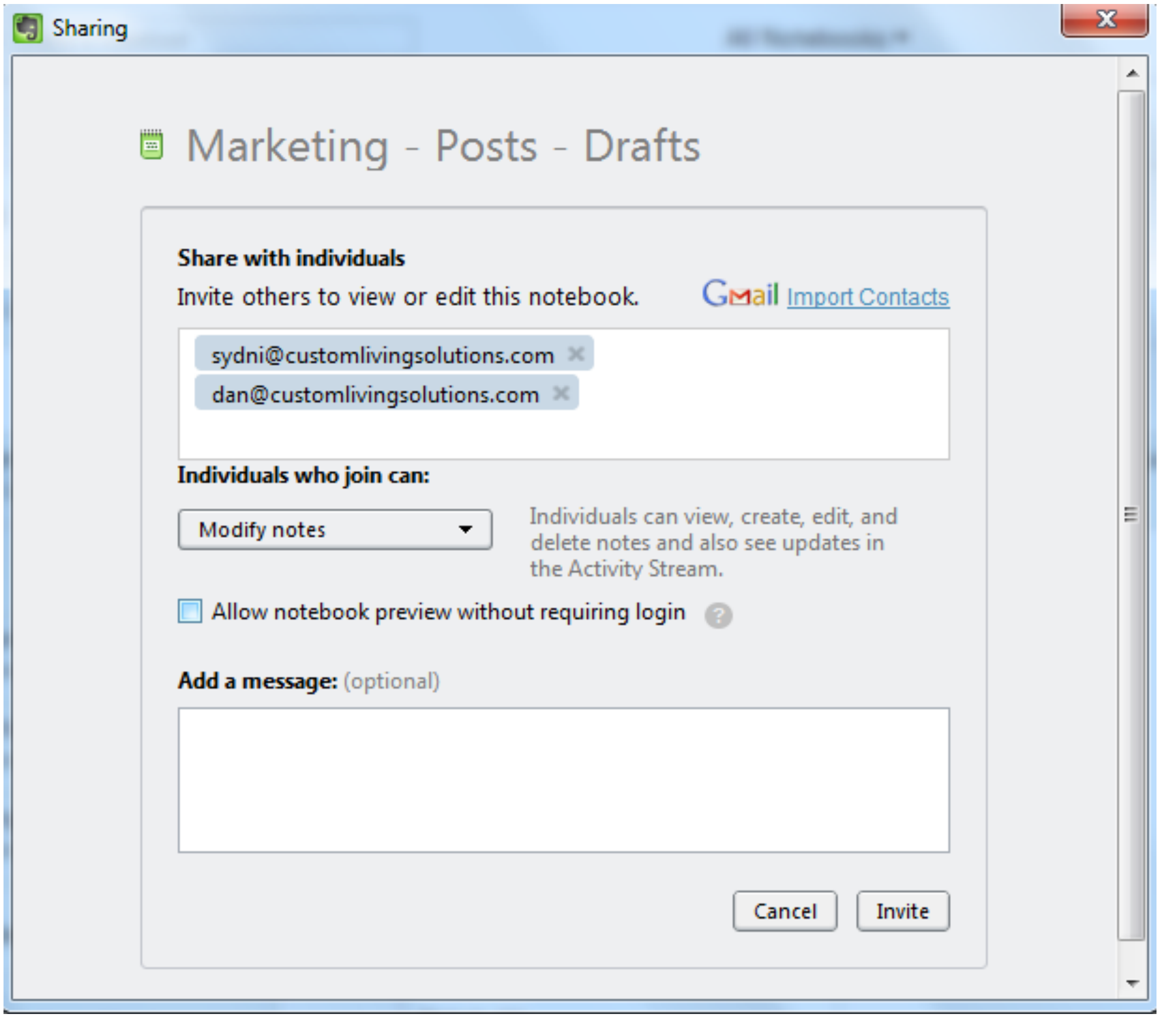
Start by creating a new notebook by clicking on the "Notebooks" icon on the sidebar, then "+ New Notebook." Let’s add a notebook called "Marketing - Posts - Drafts."



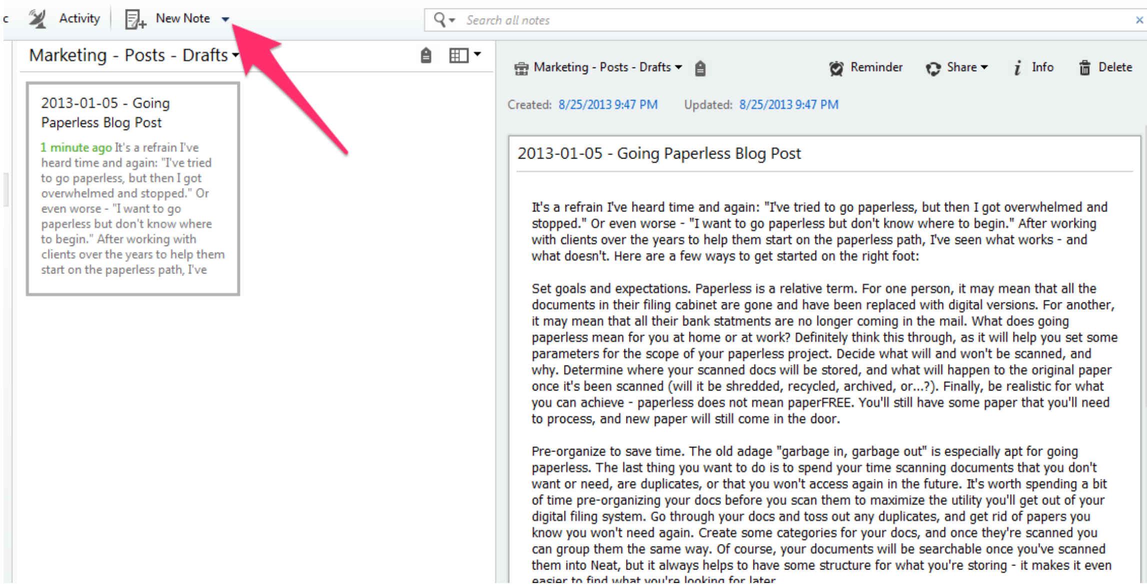
Then, let's share it with the team members who will be contributing drafts and collaborating on them. Click on the "Share" icon.



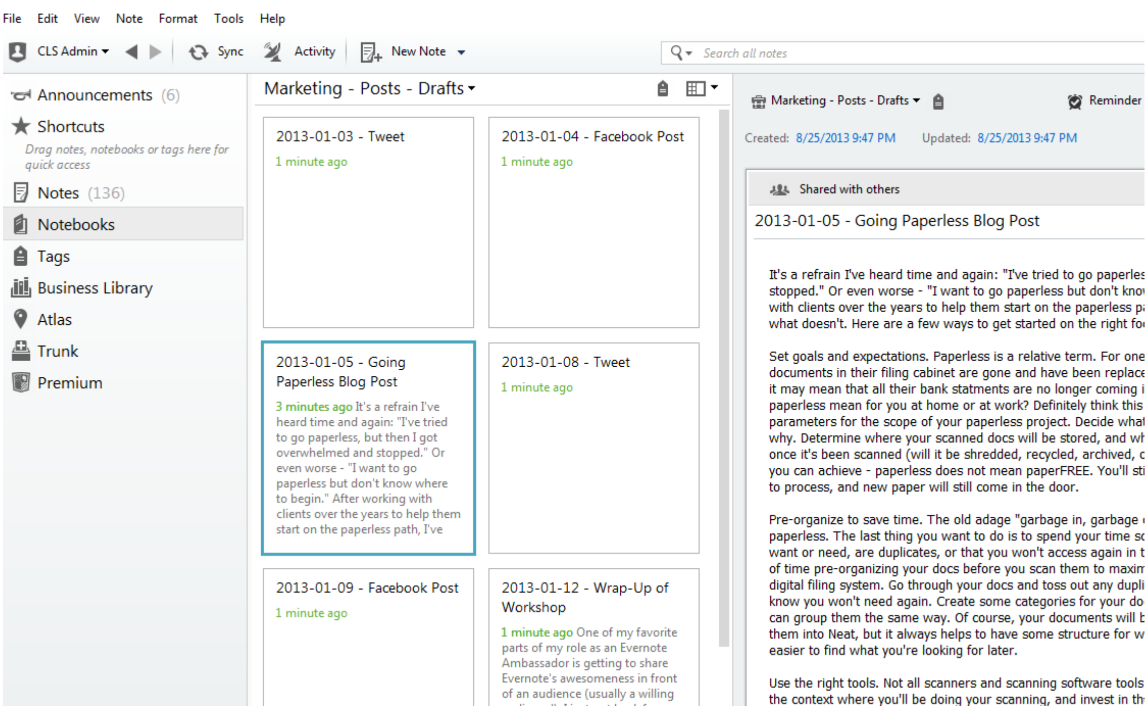
Then let's invite contributors by clicking on the "Invite Individuals" button, then entering the email addresses of the people you'd like to invite. Since we want these people to be able to add, edit, and delete notes, let's set their permission to "Modify notes."



Now, let's create a blog draft in the notebook that we just made. Add a new note with the “New Note” button and call it "2013-01-05 - Going Paperless Blog Post." Once created, fill it in with the text for the blog post.



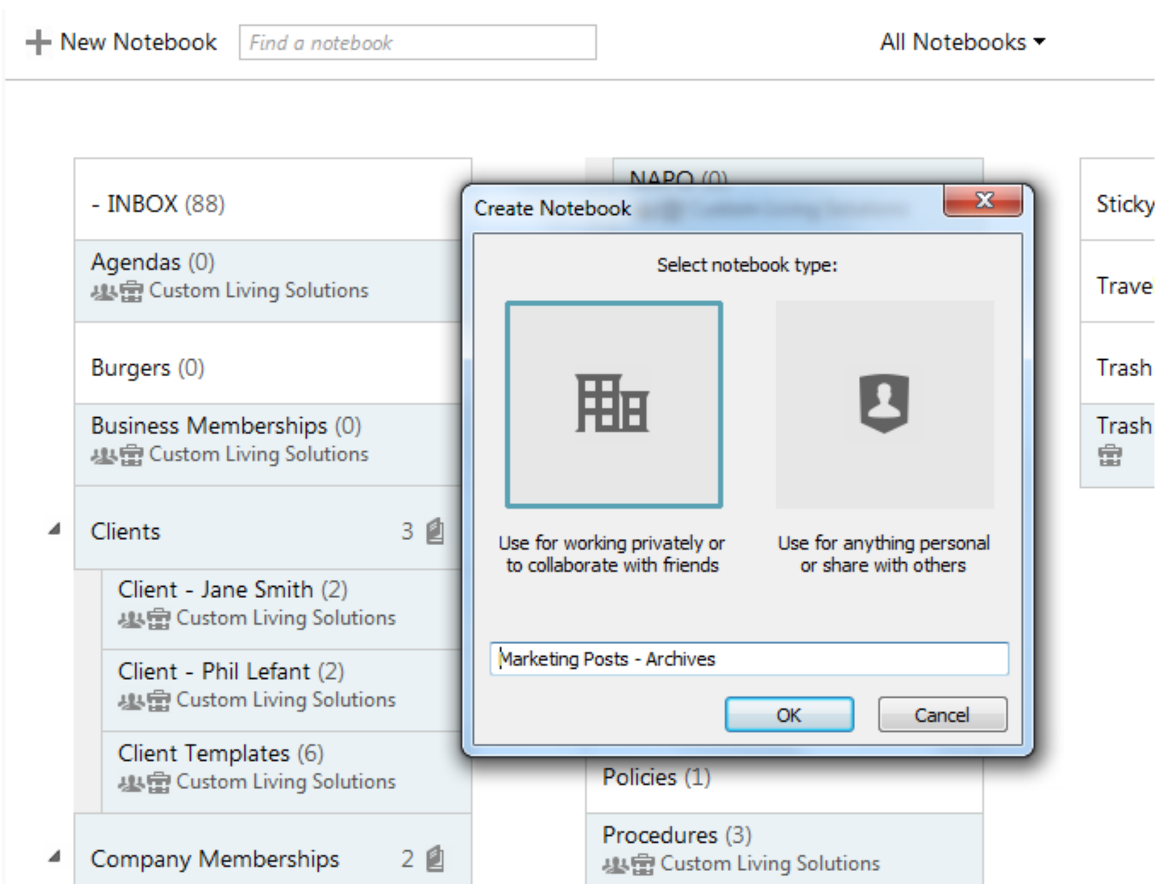
In this notebook, you can keep drafts of your company's blog posts, tweets, Facebook posts, etc. Since this notebook is shared, each team member is able to contribute the content they're responsible for, as well as edit content created by other team members before the content is distributed.



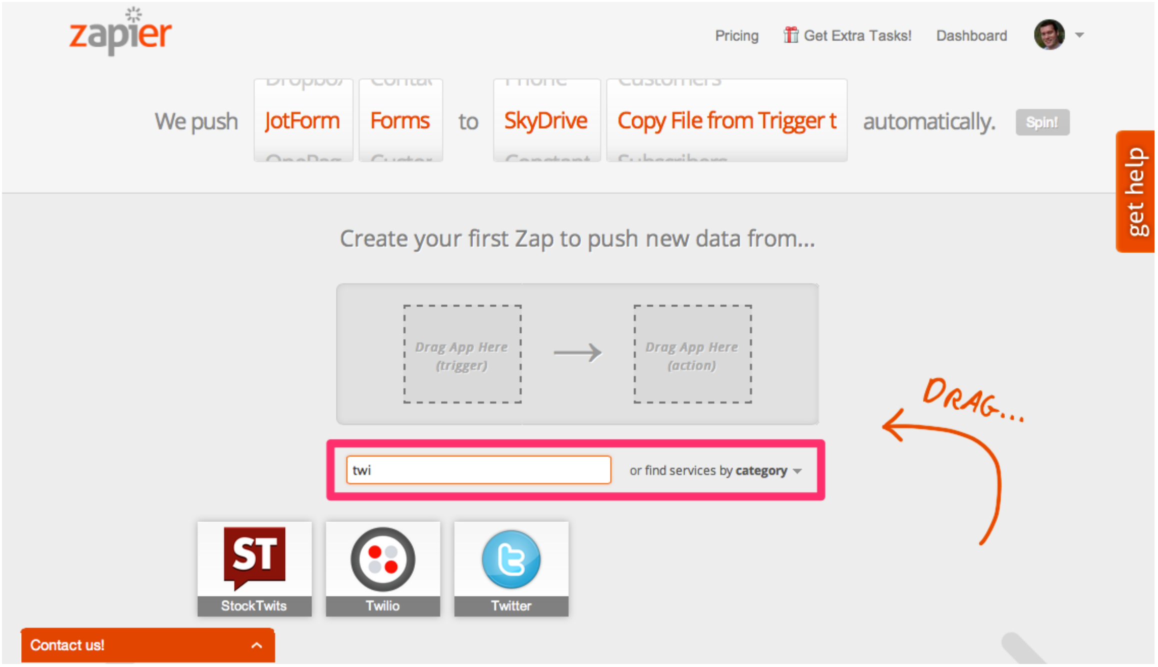
Now a permanent repository has been created for the content that your company has created. But hopefully other people are adding to your content too - via comments on your blog, responses to your social media posts, etc. You'll want to capture these as well and add them to a central repository in Evernote.

In order to do that, we'll need to use a third-party tool called Zapier to connect your online sources to Evernote. Zapier works by taking one tool or service and then connecting it to another service, and performs an action that you set based on parameters you specify. Each one of these action sets is called a "Zap." For instance, you can set up a Zap for when a new post is made on your company's Facebook page that a new note will be created with that post in Evernote. You can do this for all your social media profiles, RSS feeds, and many other services as well.

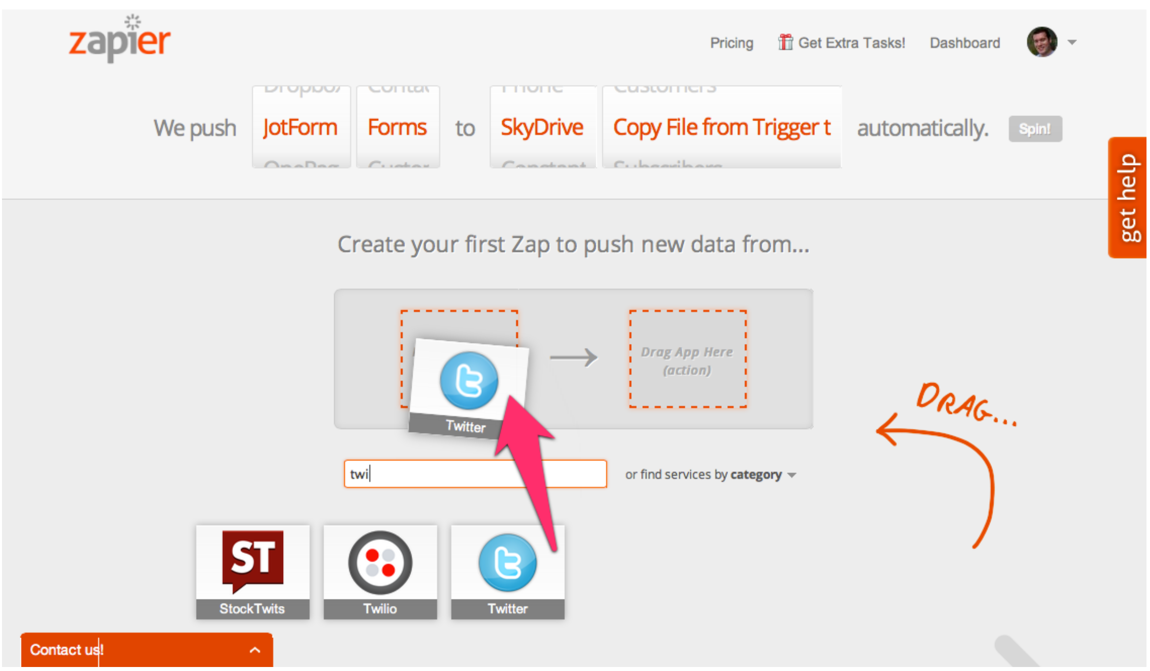
Let's set up a Zap that will put a new note in Evernote when someone searches for my Twitter name. First, let's make a new notebook in Evernote and call it "Marketing Posts - Archive." This is where we'll direct Zapier to store any posts it finds.



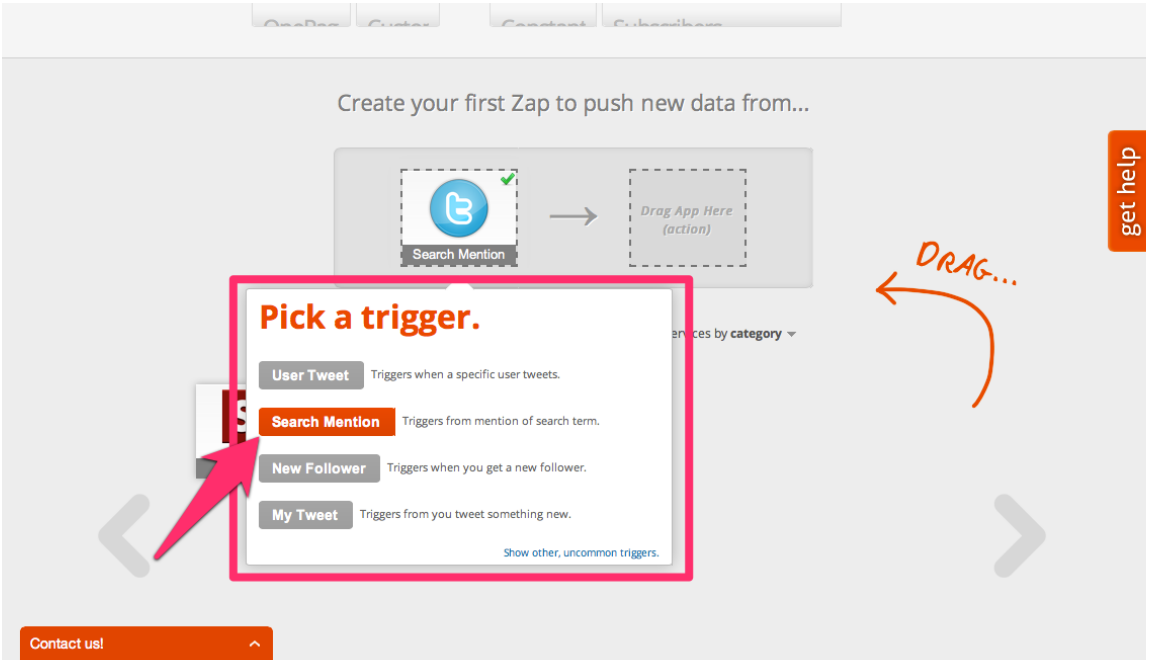
Now that the notebook has been created, we need to set up a zap to get the new tweets into this Evernote notebook automatically. Start by opening a Zapier account, then go to the main screen to set up your first Zap. In the services list, let's search for Twitter.



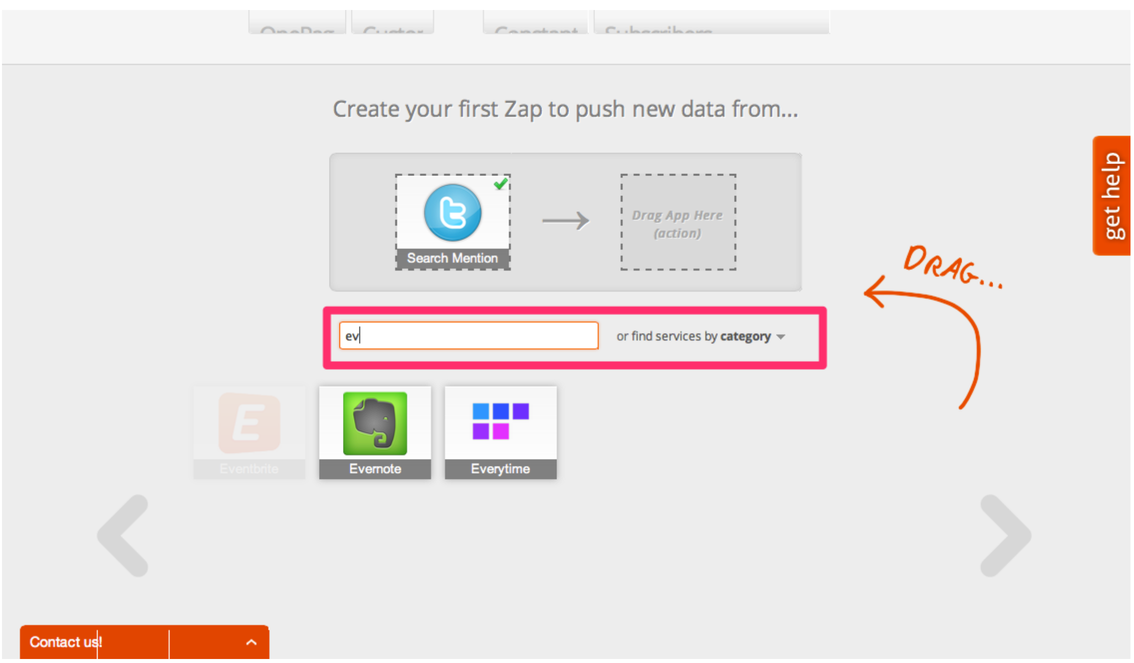
Once we see the Twitter icon, let's drag it onto the "trigger" box.



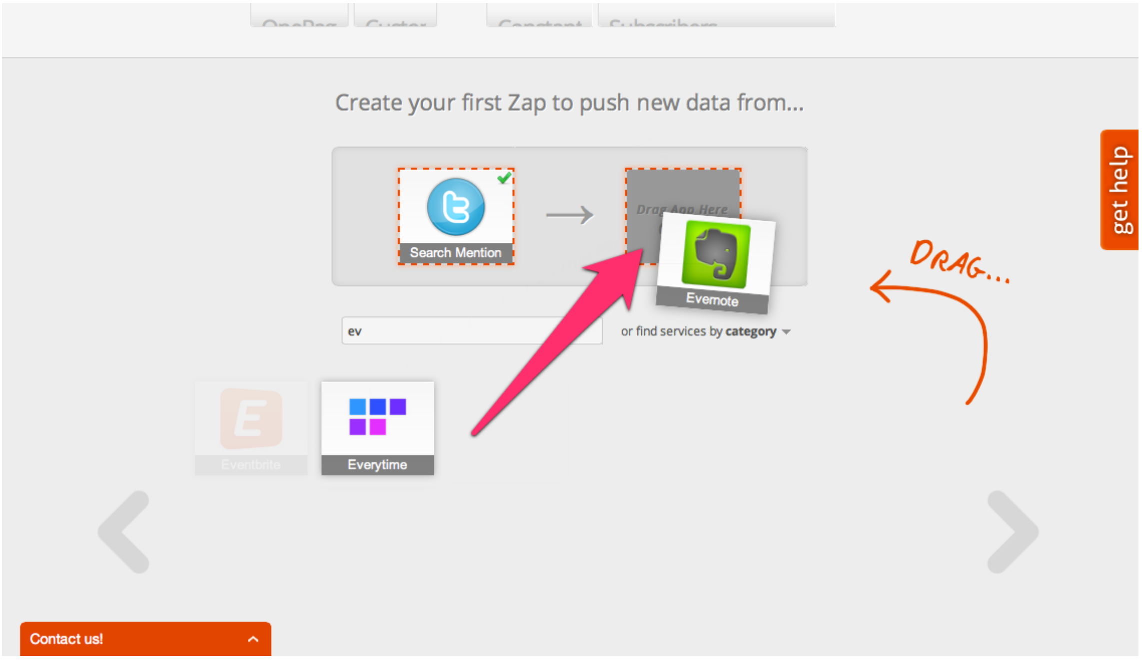
From the pop-up menu, you're able to choose what you'd like the specific action that sets the trigger to be. In our case, we want to know when someone is searching for us on Twitter.



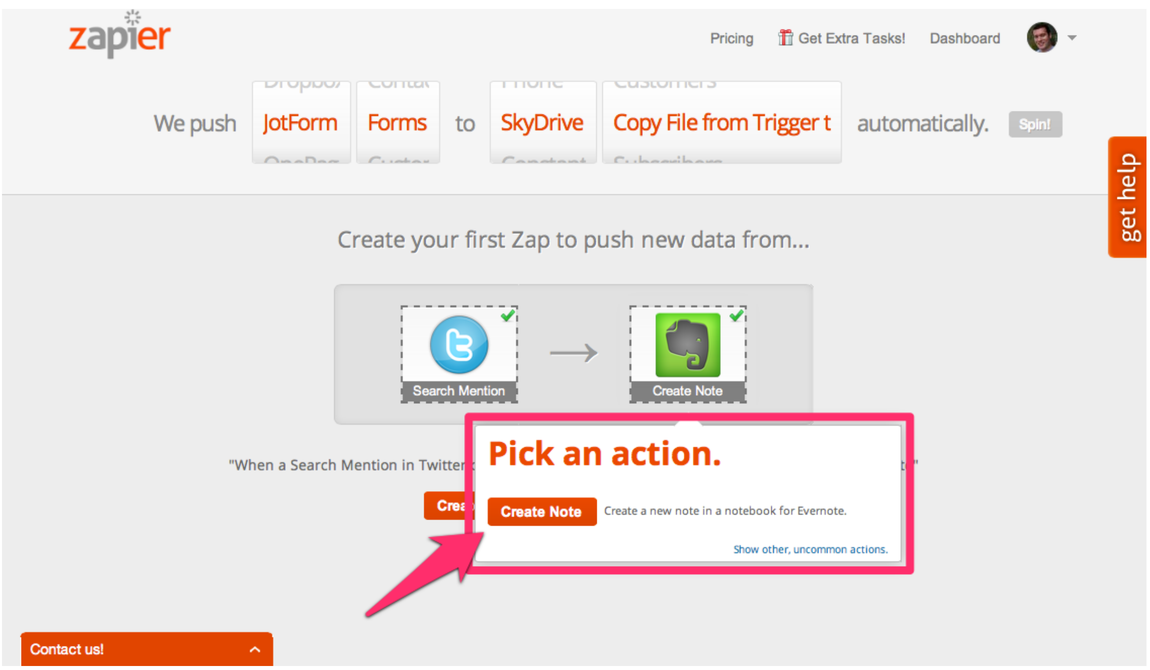
Next, we need to set the target, which in this case will be Evernote. Search for Evernote from the services list.



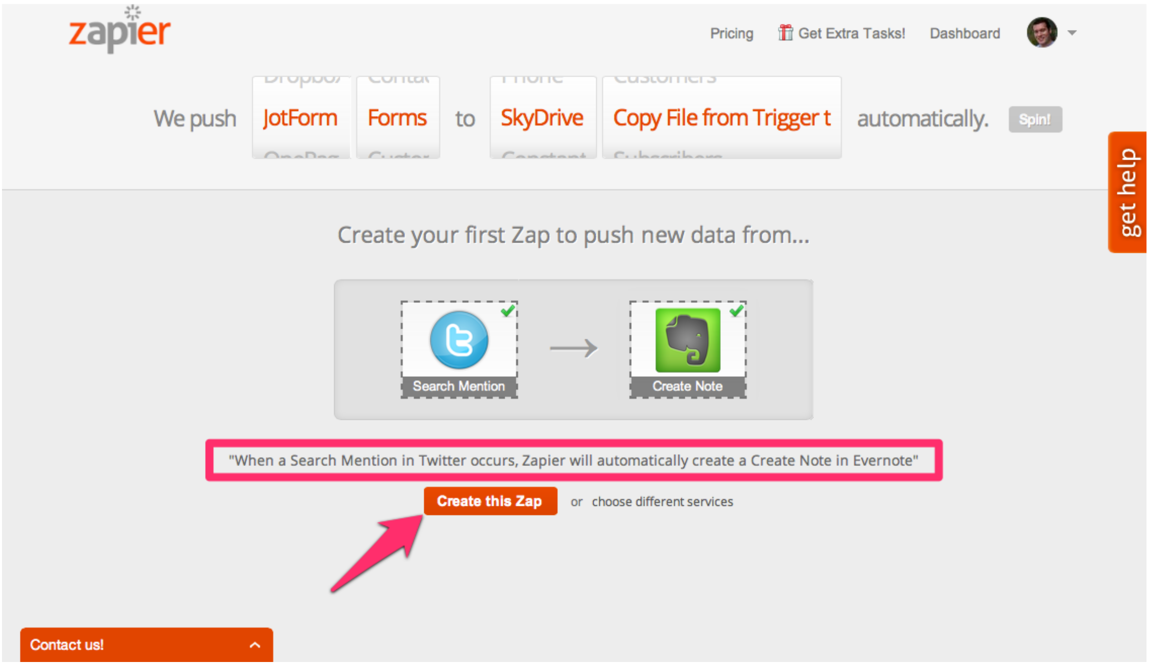
And drag the Evernote icon onto the "action" box.



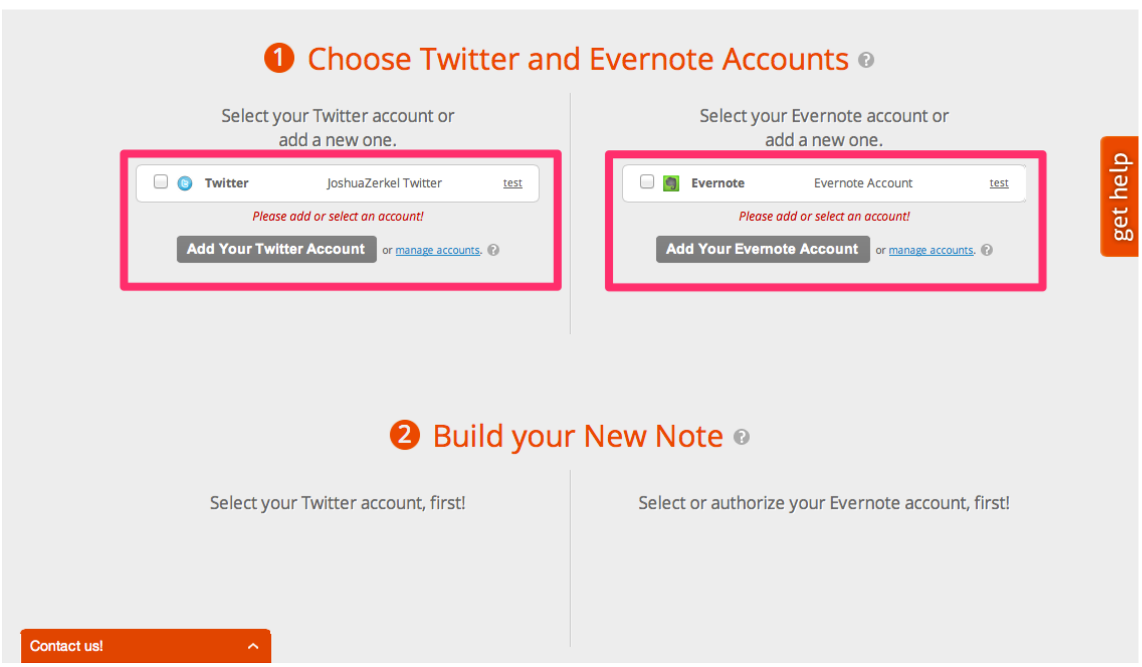
In the pop-up menu, chose "Create Note."



You'll see a confirmation of the Zap you just set up, saying specifically what will happen. Click on "Create this Zap" to confirm it.

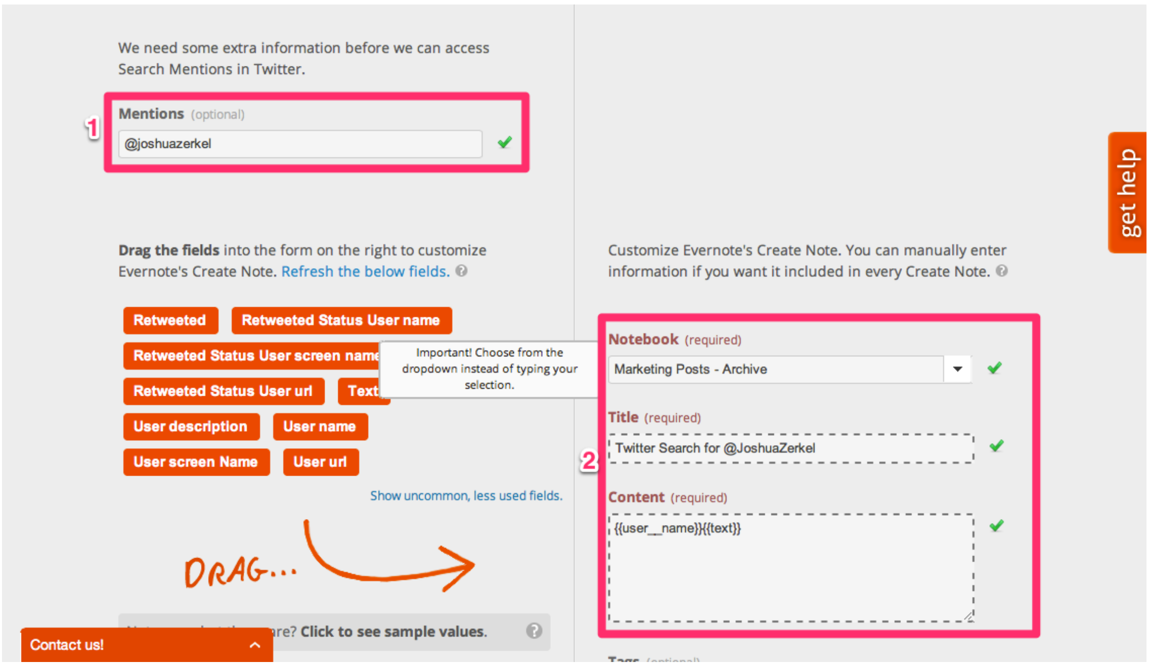


Next, we need to set the specifics of the trigger and the action (Twitter and Evernote, in our example). I've already added my Twitter and Evernote accounts and have linked them to Zapier, so they show up here. I just need to check the boxes to confirm that for this Zap, these are the accounts I'd like to use.

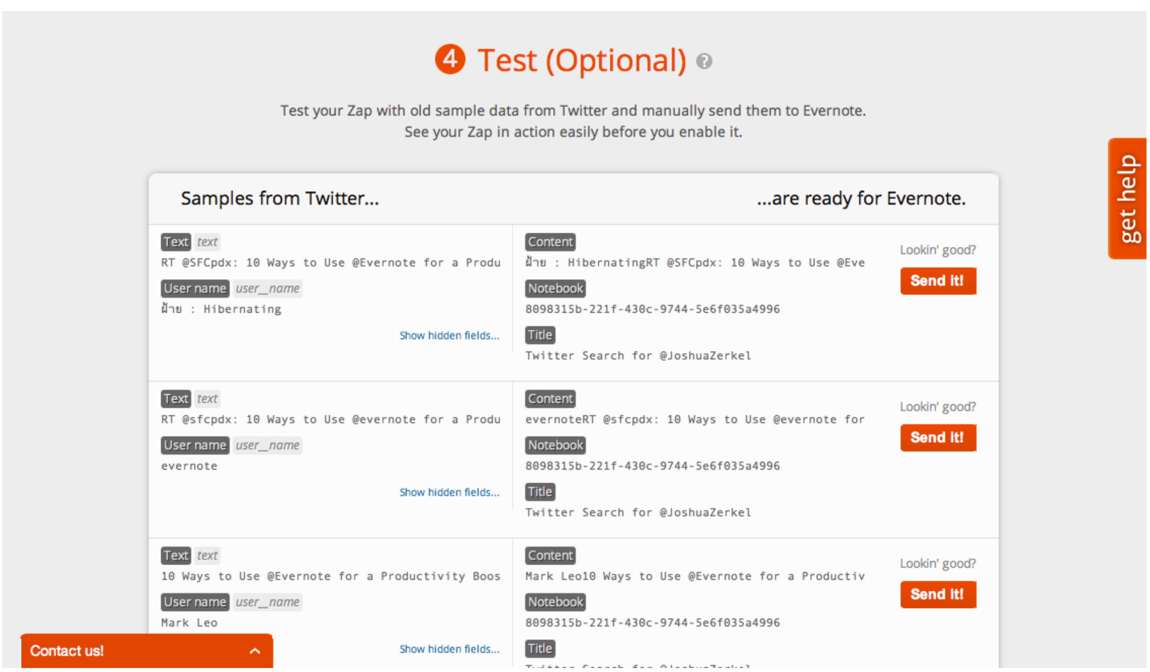


Once I've done that, then I have to set up the note that I'm going to have Zapier create. First, I want to specify that I'm looking for mentions of my Twitter name (1).

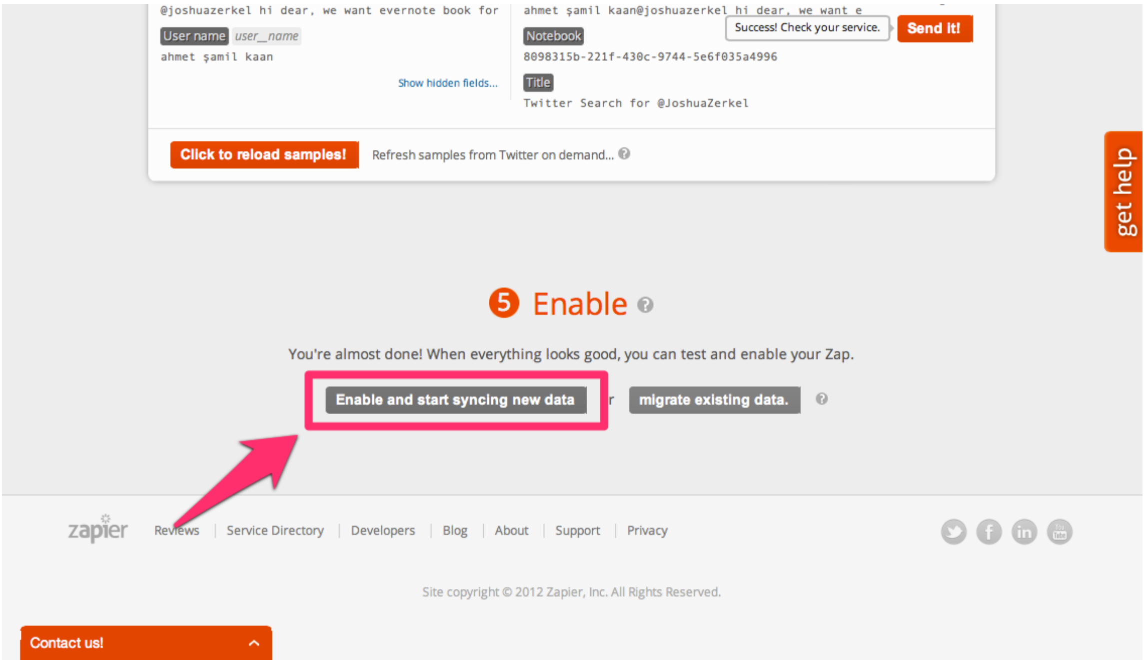
Then, I need to specify what will happen in Evernote when my name is found (2). I can specify what notebook I'd like a note created in, the title of the note, and what content will be in the note - in this case, I want to create a note that has the Twitter name of the person who wrote the tweet, along with the tweet's contents. I can do that simply by dragging the fields I want from the left of the screen directly into the "Content" box.



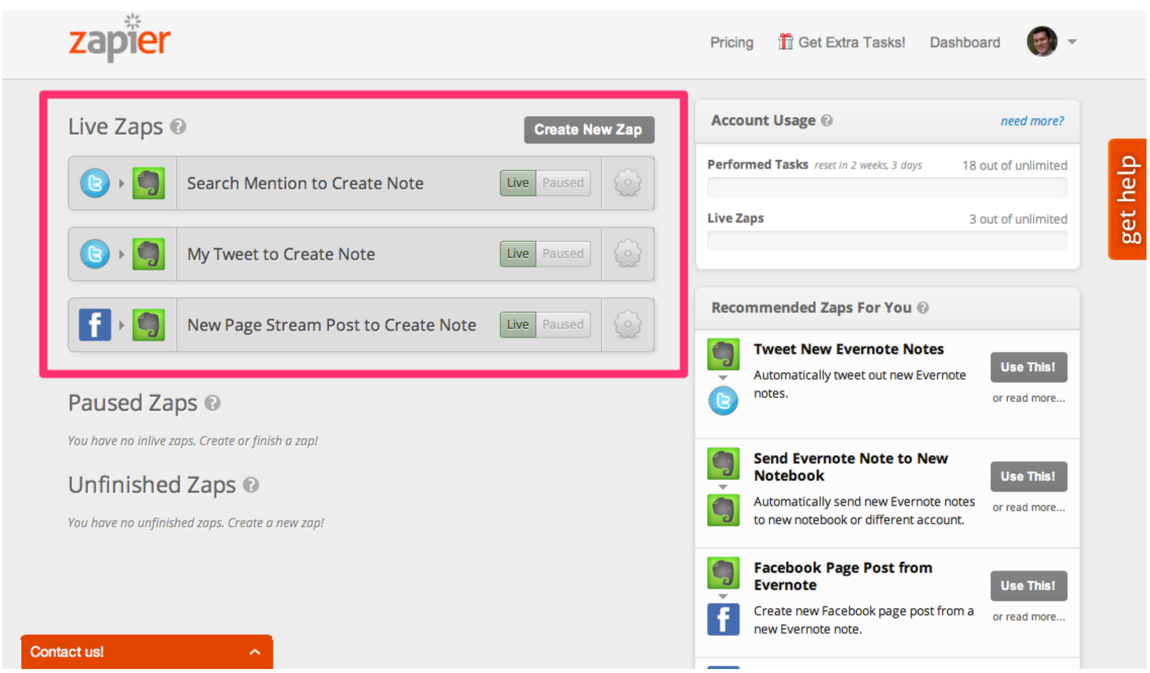
Then, if you scroll down the screen a little bit you can run a test to make sure that your Zap is working how you expect it to.



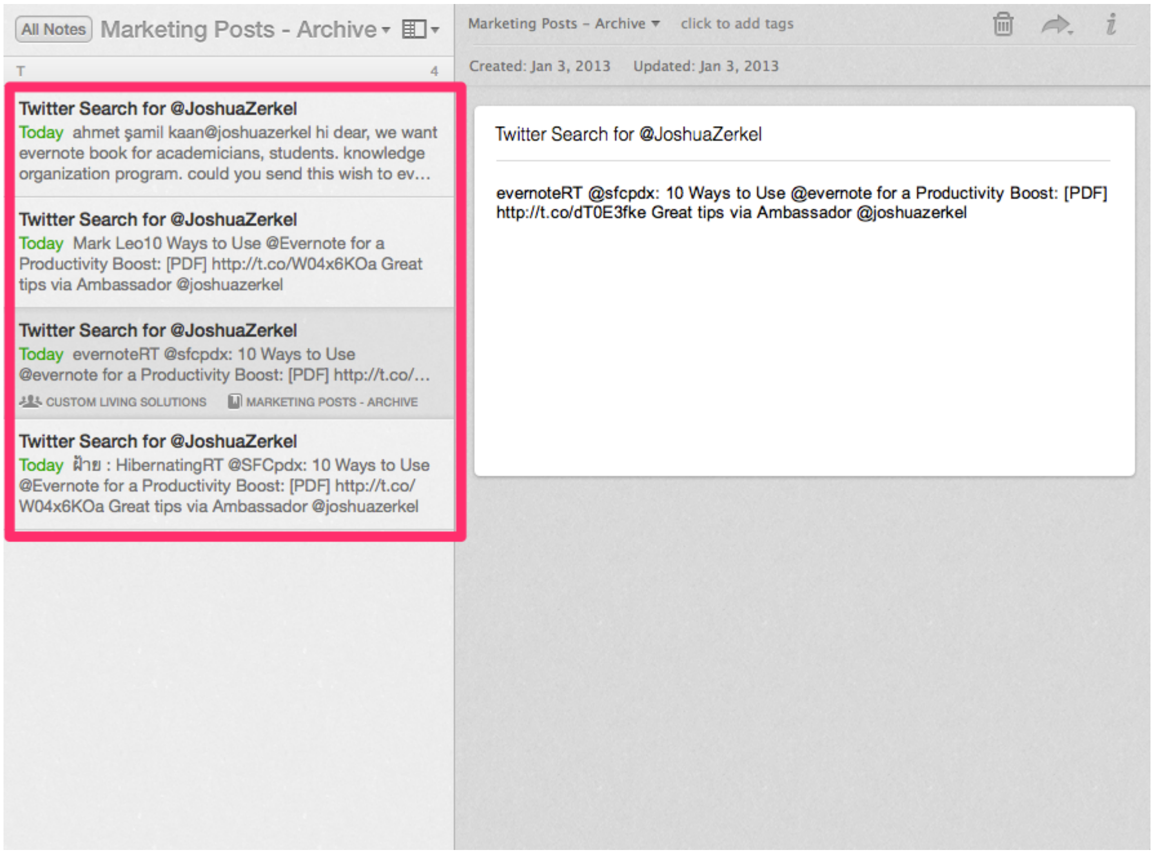
Assuming everything looks ok, you can then click the "Enable and start syncing new data" button to enable your Zap.



You'll then see a confirmation screen that lists this Zap, along with any others you've created. From here you can pause or modify them, and you can also add new Zaps.



Let's switch back to Evernote. If we go into our "Marketing Posts - Archive" notebook, we should see new notes that Zapier creates when someone mentions my Twitter name. Each time there’s a new tweet, a note will be created automatically in Evernote, creating a permanent archive (note that in the view below, the note list is displayed in Snippet View).



You can use this process with your blog's RSS feed and other social networks to create Zaps for each one, sending new posts, comments, etc., directly into your Evernote notebook. Once you set up each Zap, you don't really have to take any further action, as Zapier and Evernote do the work of archiving your posts for you!

Don’t Steal – Swipe!

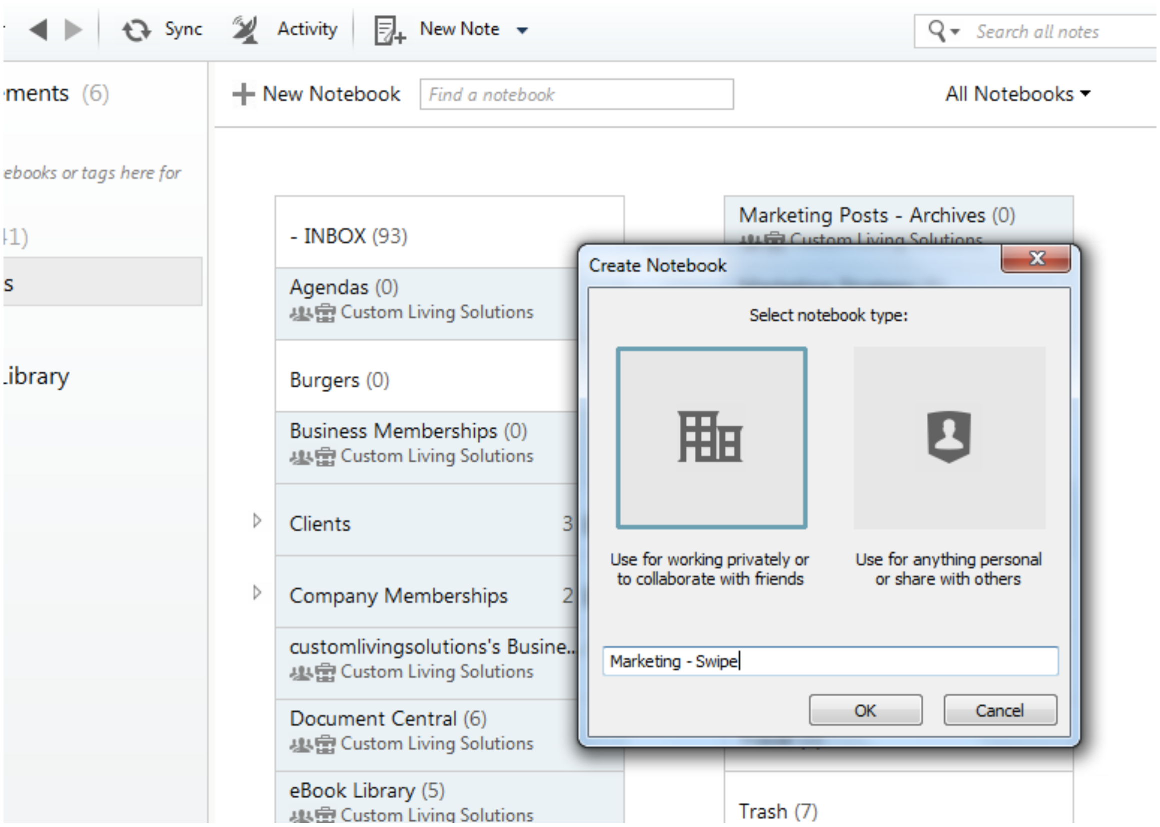
In the course of your everyday activities, chances are you're bombarded with marketing messages and advertisements of every variety. Most of these you probably tune out (for sanity's sake, if nothing else!), but some of them you may actually like - perhaps you enjoy the graphic design of one ad, the turn of phrase in another, and the photos on a third.

Marketing is often about finding ideas that you like, taking inspiration from it, and then reworking those ideas and inspirations into a new creation that helps represent your business. Ideas can come from anywhere - and when they do, you want to be able to capture them, and then later, find them when it's time to get re-inspired for your own projects.

I call the act of capturing this sort of information - marketing-related inspiration and ideas produced by other people - swiping. You're not stealing it, as you don't intend to reproduce it verbatim. Rather, you're swiping the inspiration and ideas, and then will put your own marketing spin on it, creating something new.

Because you can capture virtually any type of information and then organize it, Evernote is a great place to store the things that you want to swipe for your business. I personally have used my swipe notebook many times when I'm feeling stuck or want to emulate something that I think was really well done.

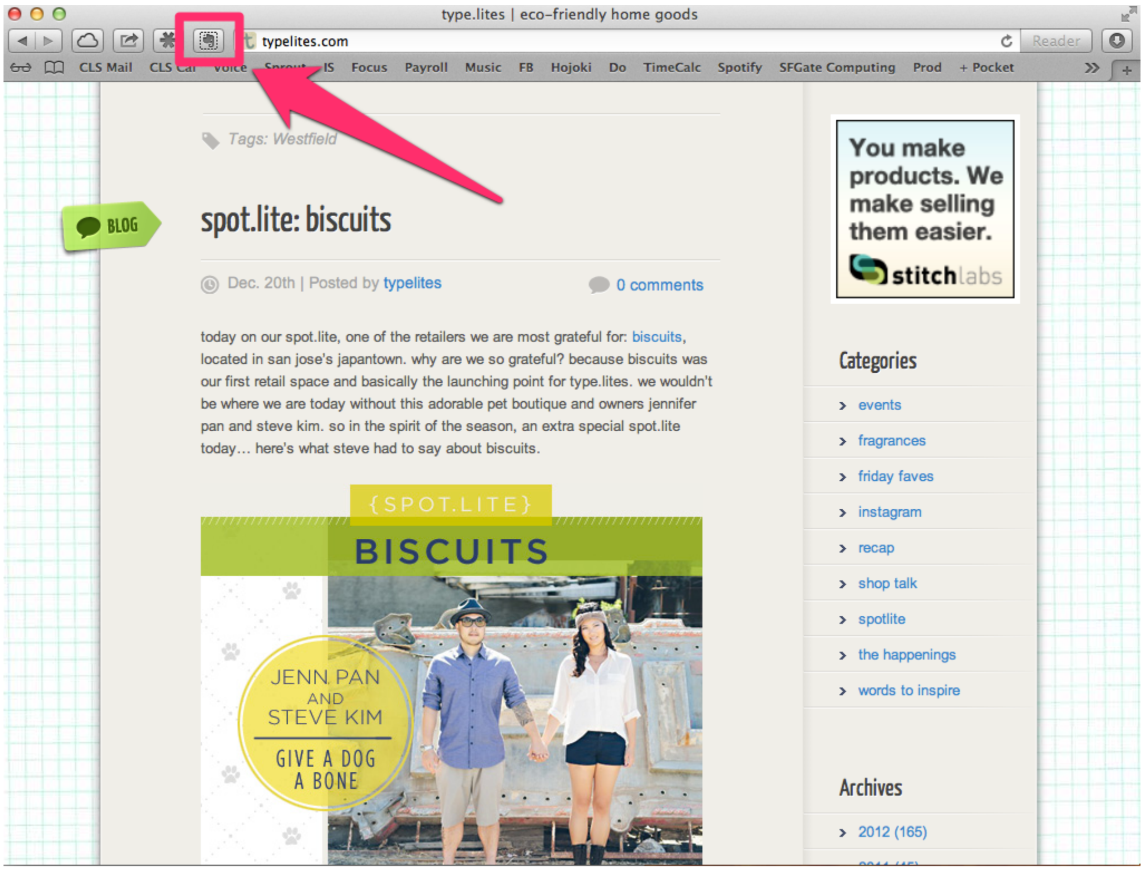
Let's start by creating a spot for us to store the interesting and inspiring things you come across. Create a new notebook and call it “Marketing - Swipe.”



Now that you have a home for your swipes, we need to start collecting some. Since Evernote can collect information in a number of ways (take photos, scan documents, capture web pages, type your own notes, etc.), you can be as creative as you'd like when capturing ideas.

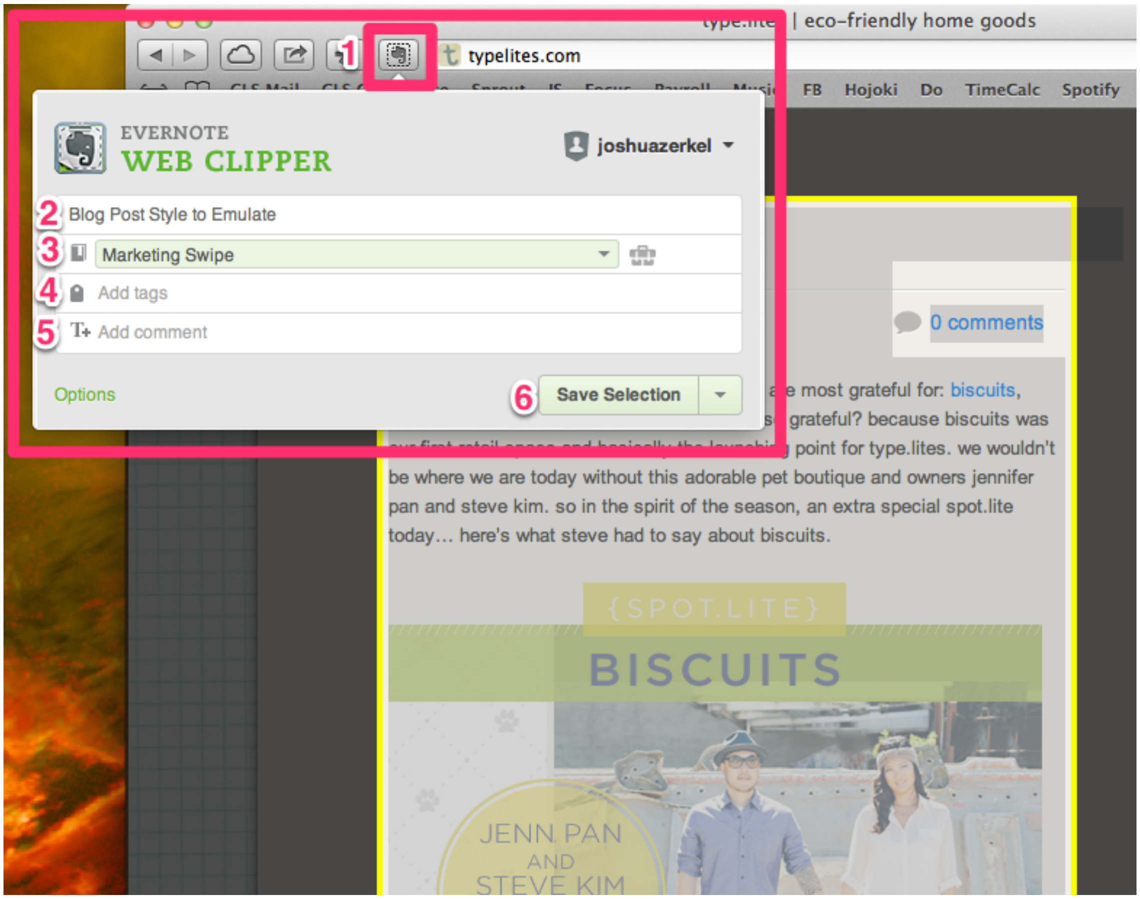
Let's start by capturing a blog post from a site that we like. Using the Evernote Web Clipper (an optional download on Evernote.com), you can capture portions of web pages and save them directly into Evernote in the notebook of your choice. This is much better than bookmarking because you've permanently captured the information, rather than just linking to it as with a bookmark. Now you don't have to worry about the link going dead or the page moving - the content you want is captured in Evernote for you to find later.

The Web Clipper will look slightly different depending on the browser you're using, but generally it's a button on your browser's toolbar that you can click to capture content you've selected. In Safari, the Web Clipper looks like this:

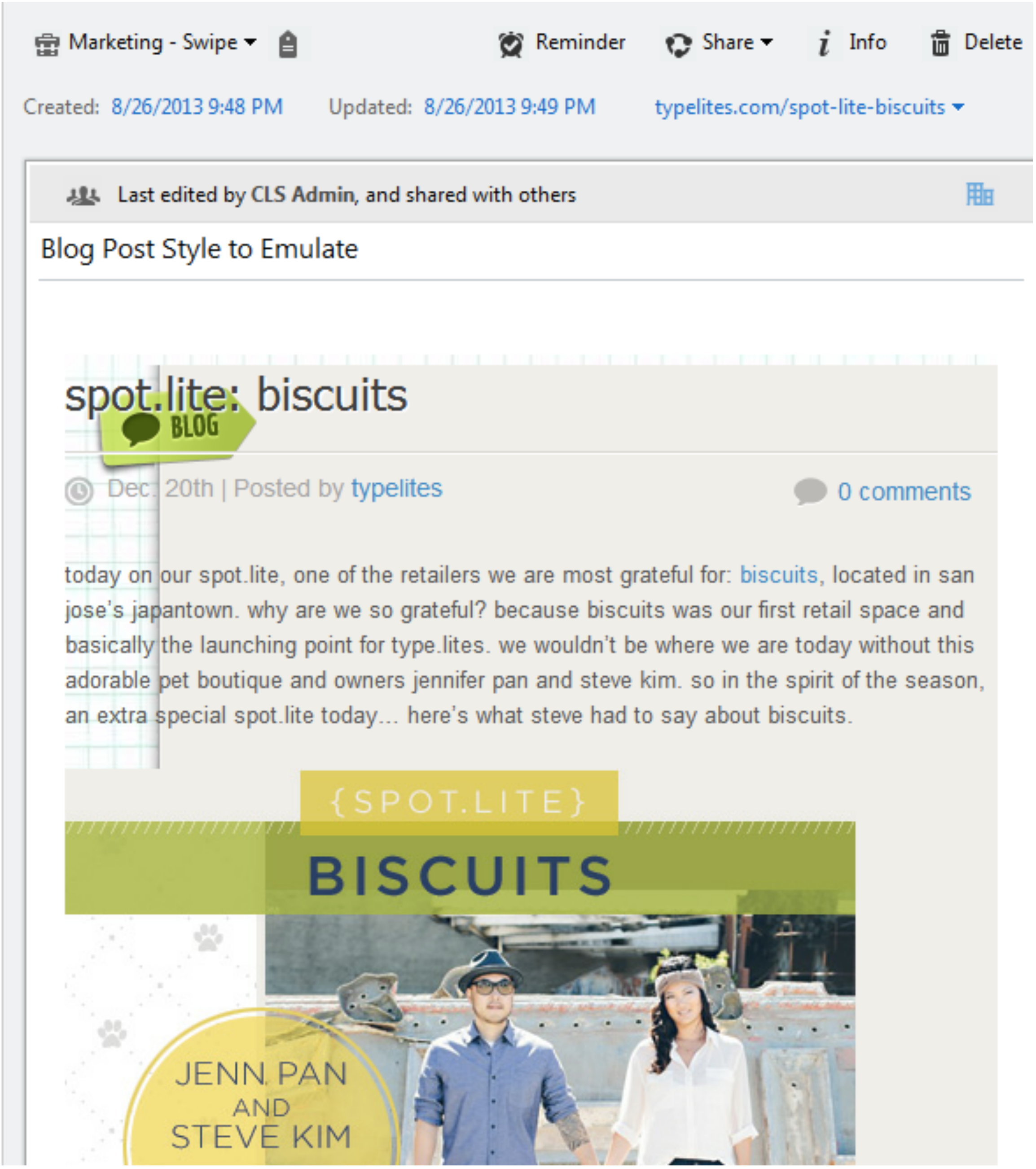


Again, depending on your browser the Web Clipper may appear slightly differently or may show up in a different spot in your browser, but generally it looks like the Evernote elephant logo. Note that in this example, I'm clipping content using my Mac, but since Evernote automatically syncs content across my devices, I'll see the new note that gets created on my Windows laptop.

To get started, click on the Web Clipper button (1). A pop-up menu will appear where you can choose the title for the note that will be created from your selection (2), along with what notebook you'd like it to go into (3), any tags (4), and any text you'd like to add to the note (5). Click the "Save Selection" button (6) to put the note in the "Marketing Swipe" notebook.

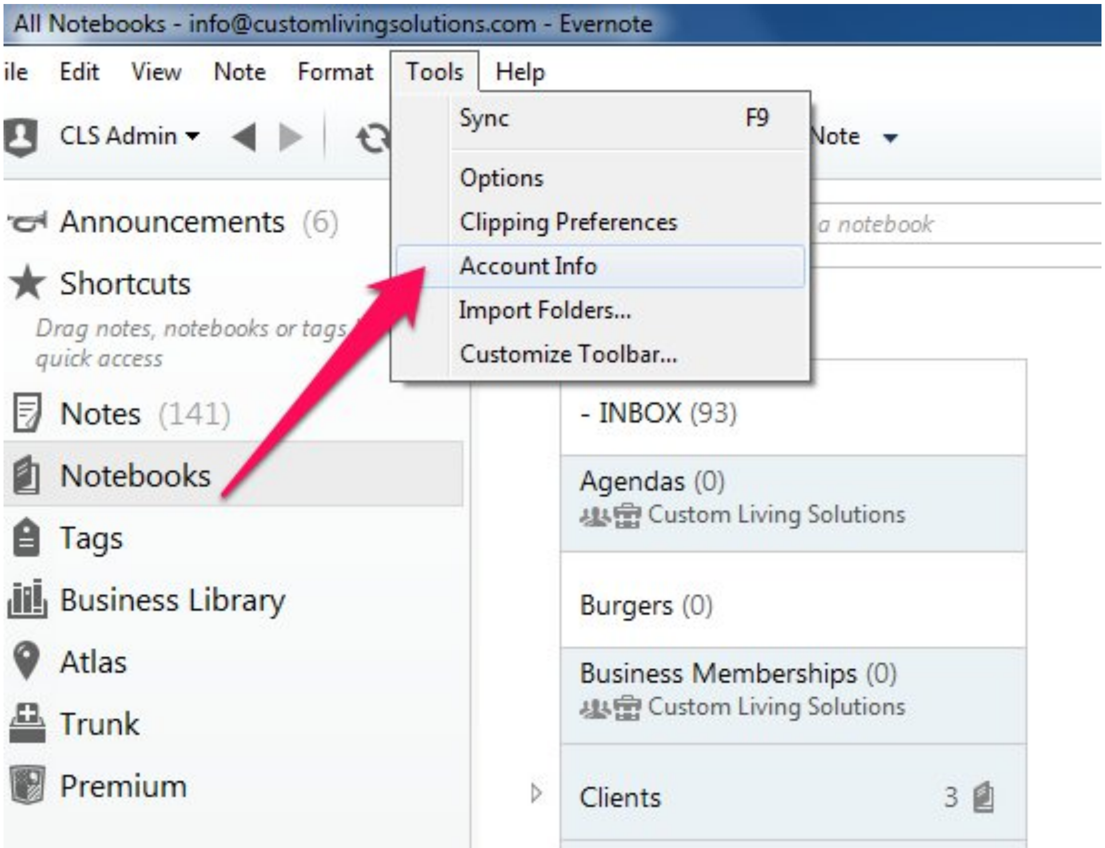


A dialog box will pop-up confirming that your selection has been clipped and is now saved in Evernote. When you switch back to Evernote and look in the "Marketing Swipe" notebook, you'll see that your selection is now captured as a note - where you can access it and annotate it.

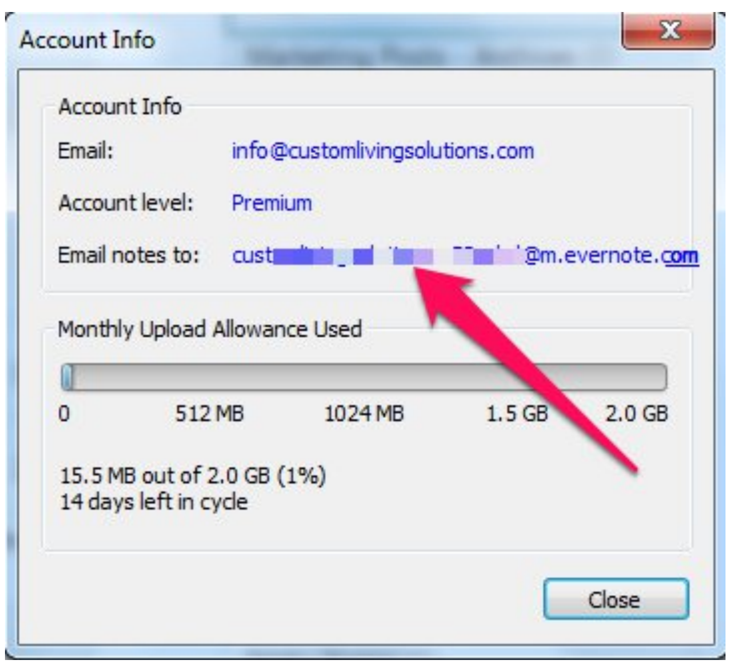


But what about when you receive an email with a great idea that you'd like to emulate? Those emails can make their way into your swipe notebook too.

To get an email that you've received into Evernote, you have to first know what your special email-to-Evernote address is. To find yours on Mac, click on your account button, and then on "Account Info" from the menu. On Windows, click on the “Tools” menu, then on “Account Info.”

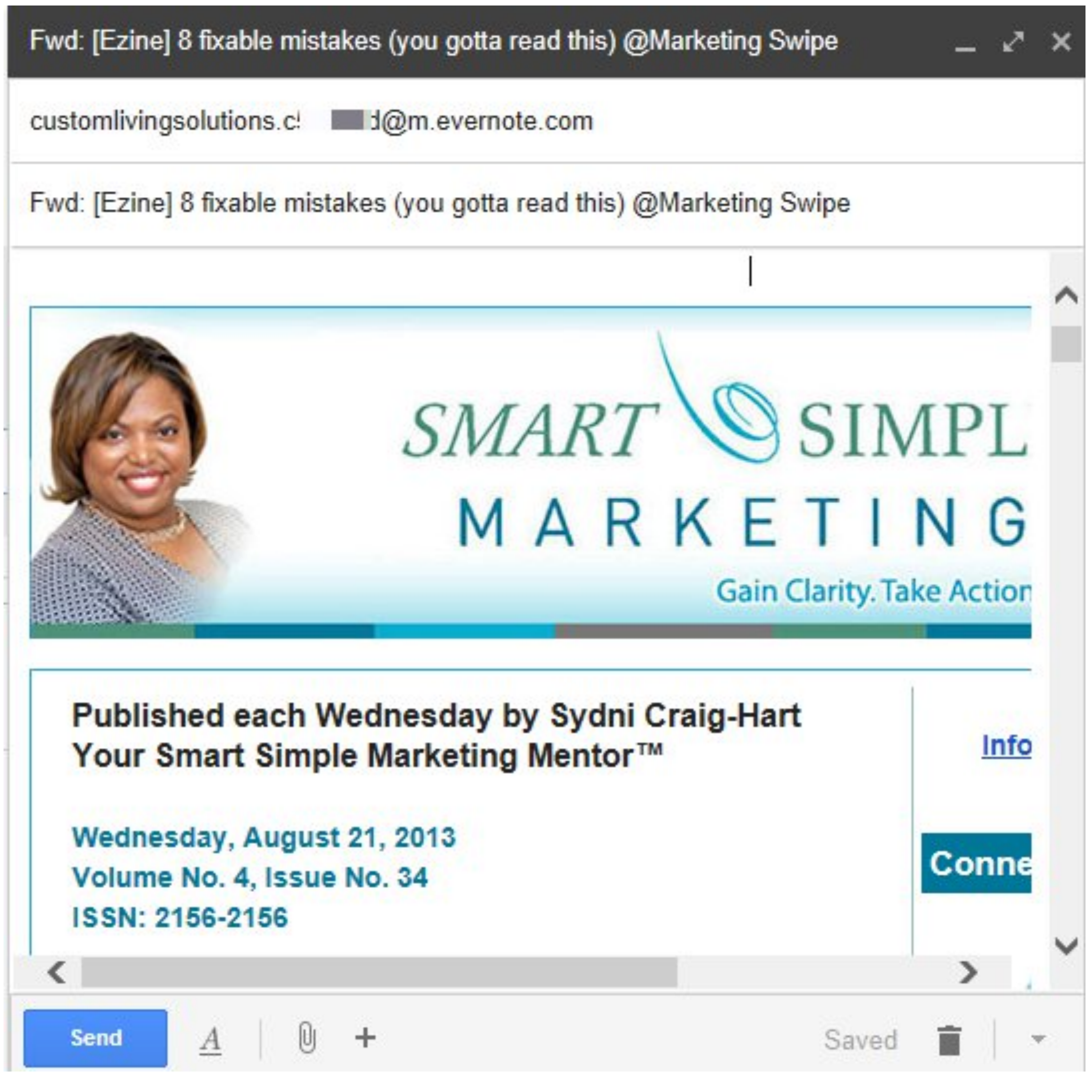


The pop-up window shows various details about your account, including space used during your current billing cycle and your billing information. But we're looking for your "Email notes to:" address. This address can be used to forward any email into Evernote.



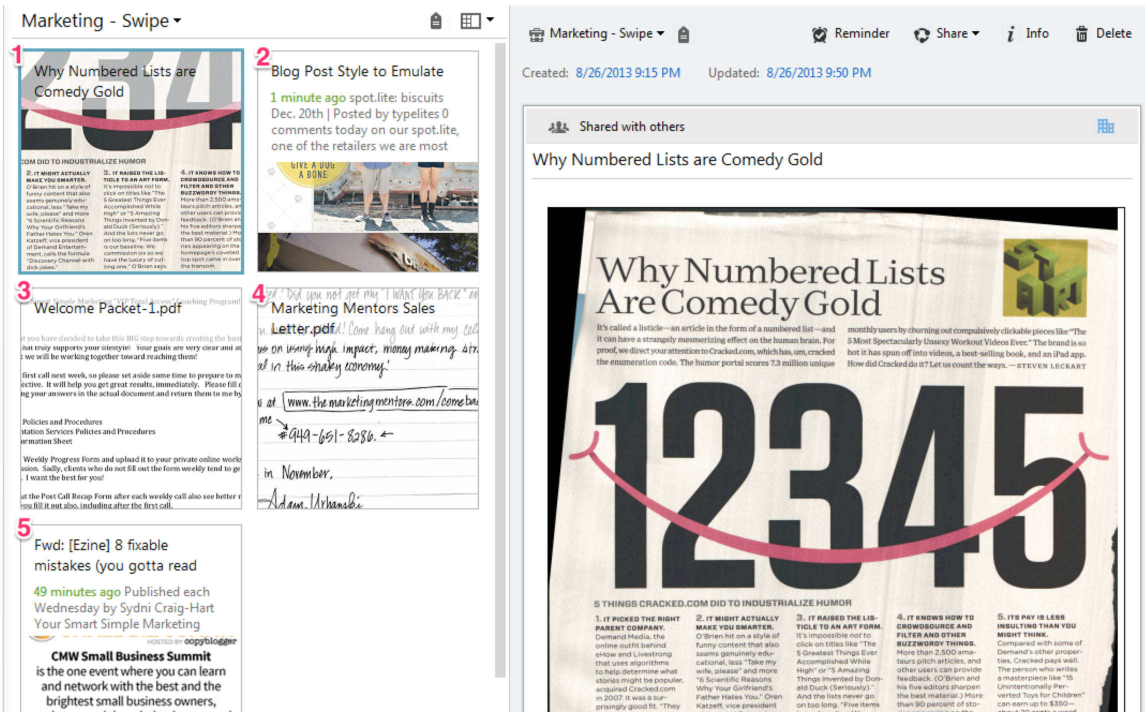
When you send or forward a message to Evernote, you can specify in the subject line what notebook you'd like it to go into by putting the @ sign and then the name of your notebook, and you can add tags by putting the # sign and then the tag - if you do nothing, the note will just end up in your default notebook.

There's an email in my inbox that I'd like to send to Evernote and put into the "Marketing Swipe" notebook. In my email program, I'll forward the message to my Evernote email address. In the subject line, I’ll specify that I want it to go to that notebook by adding the text “@Marketing Swipe” (without the quotes) at the end of the subject line.



The note now is now in my "Marketing Swipe" notebook. If I didn’t type the name of the notebook exactly into the subject line of the email, the new note would show up in my default notebook, and I could move it into the correct notebook from there.

Since you can use Evernote to capture lots of different types of content, your swipe notebook may end up looking pretty diverse! In the example below, there's an article I tore out of a magazine and scanned in (1), the blog post we just captured using the Web Clipper (2), a PDF that I dragged in to Evernote (3), a document I took a photo of (4), and the email that I forwarded in to Evernote (5). All these disparate items are now organized and searchable in Evernote.



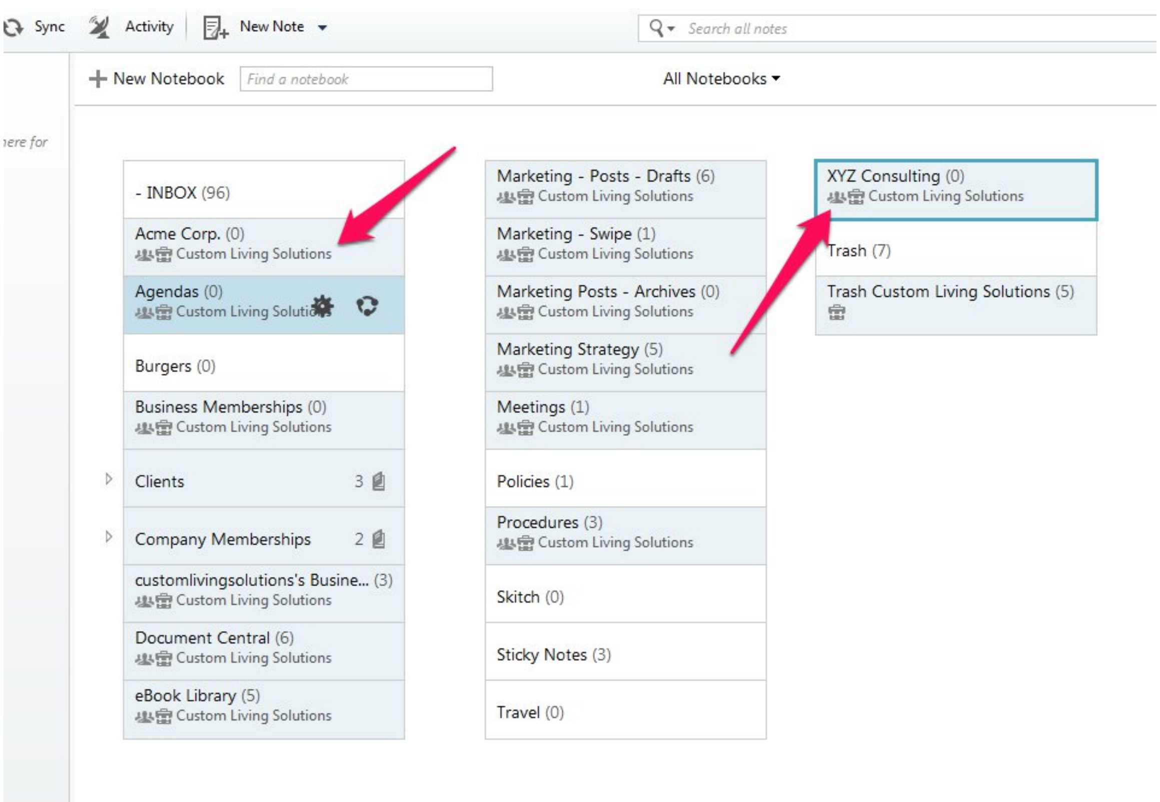
Think of all the marketing-related content that you come across that you like. Try capturing those items in Evernote, where you and your team can make use of them!

I’ve Got My Eye On You

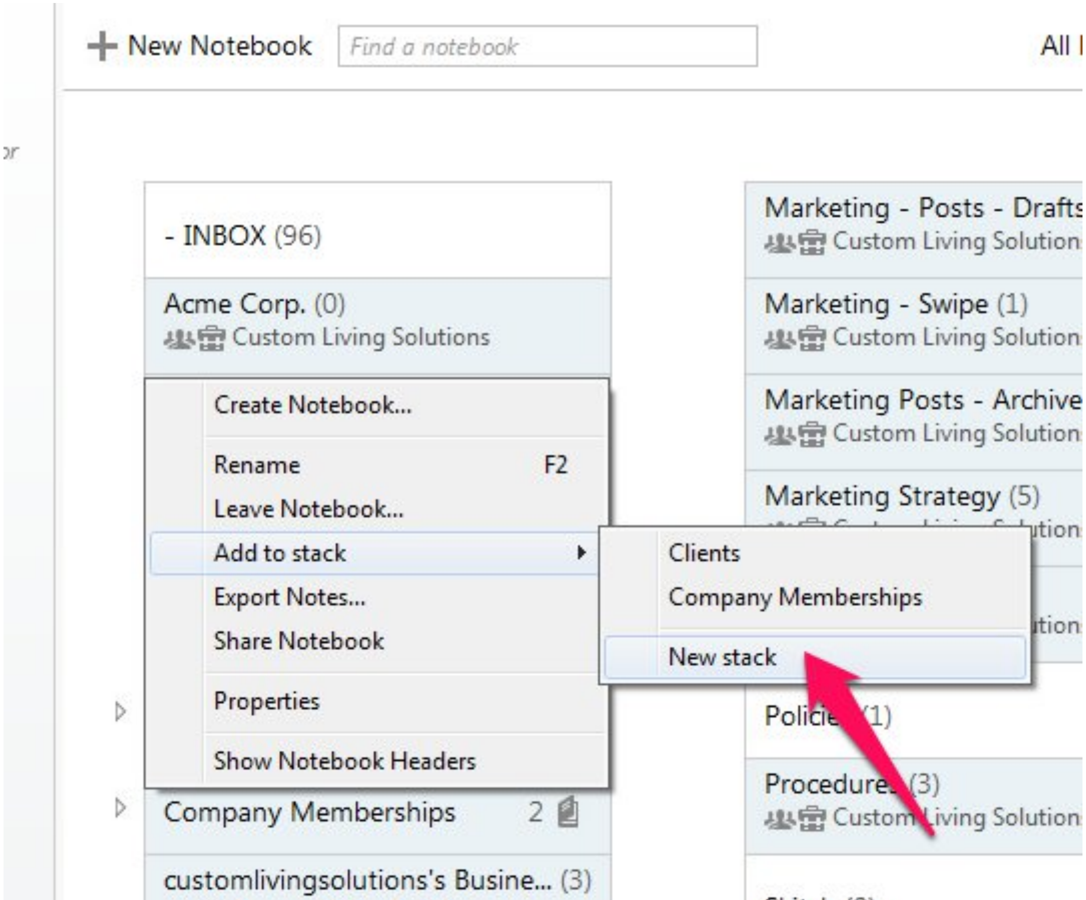
Marketing is more than just the activities that your company is doing to spread the word about your products or services. An important part of your marketing efforts is keeping track of what your competitors are up to. How are they advertising? What are they saying online and in social media circles? How does their marketing compare with yours? Monitoring what's going on in your competitive landscape can help keep you a step ahead.

One way to do this using Evernote is to set up a notebook stack for "Competitors" and within it have a notebook for each competitor that you're tracking.

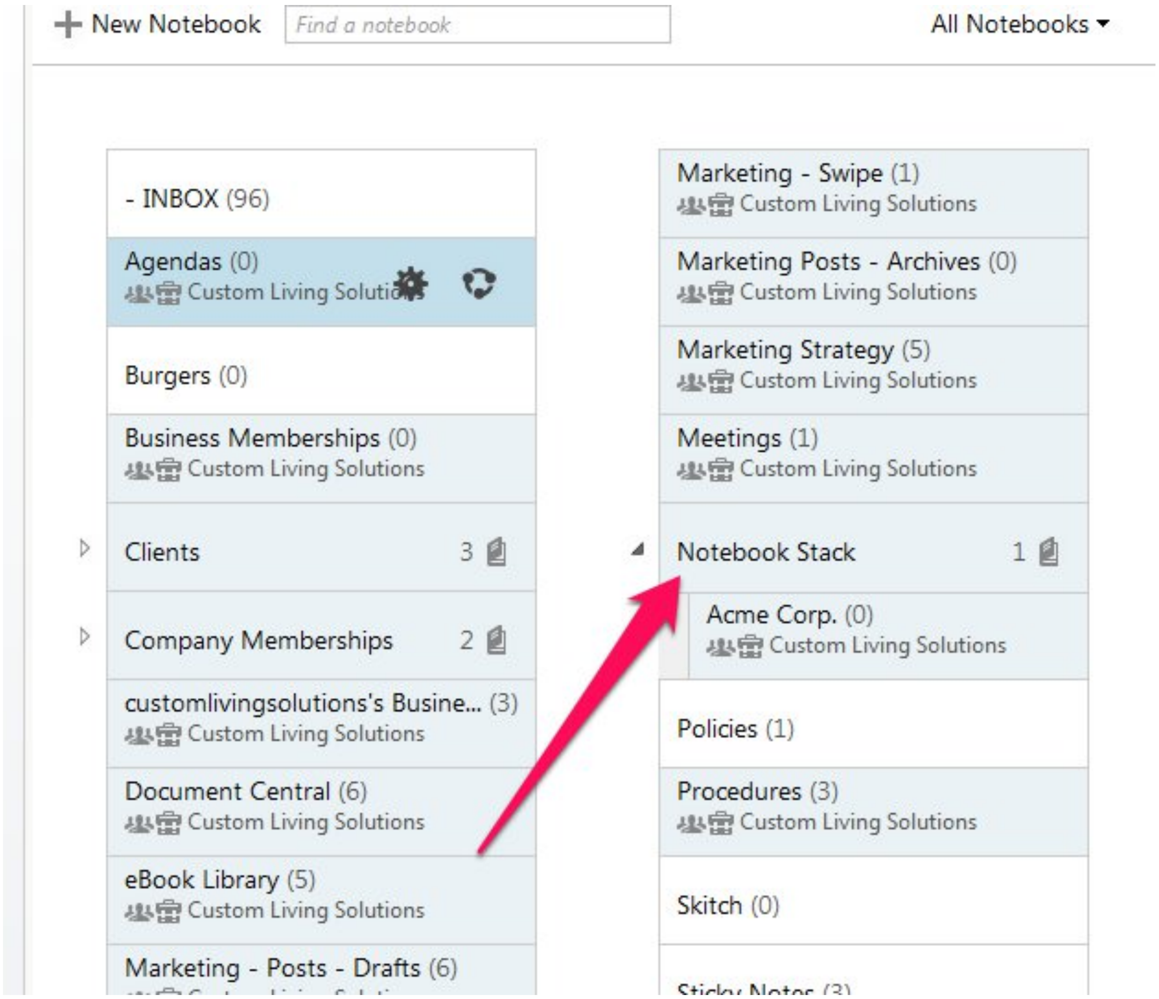
Let's start by adding new notebooks, one each for two of our competitors, Acme Corp. and XYZ Consulting.



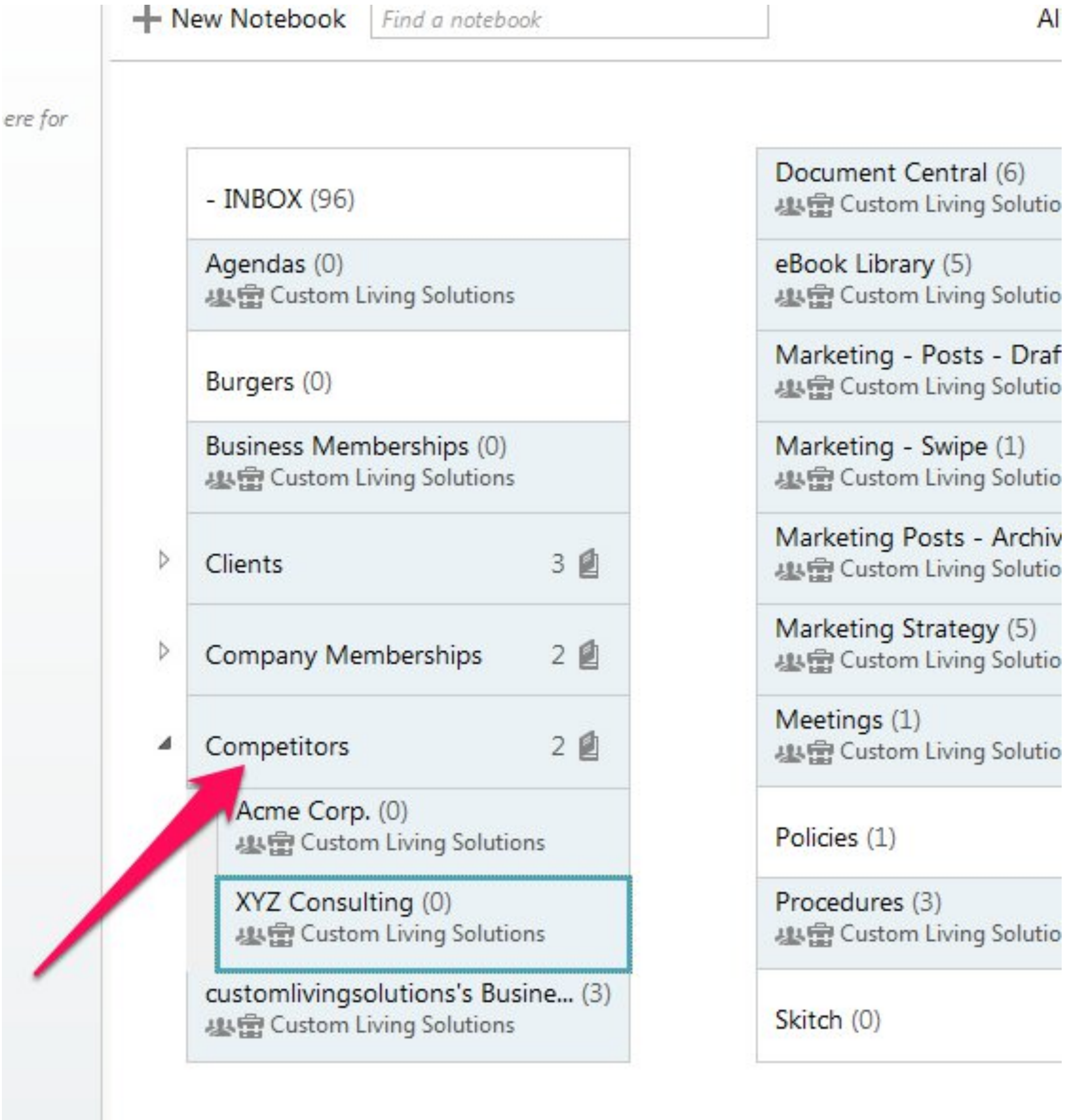
Now let's create a notebook stack to keep these organized. Right-click or control-click on the Acme Corp. notebook, then choose “Add to stack > New stack.”



This will create a new stack called "Notebook Stack," with Acme Corp.'s notebook inside.



Control-click or right-click on the "Notebook Stack," and rename it to "Competitors." Then drag the notebook for XYZ Consulting to add it to the stack.



Now all of your competitor info will be in one spot. As you come across content your competitors have created, you can just capture it in the corresponding notebook(s) using the methods we've explored in previous chapters (web clipping, taking photos, scanning documents, etc.).

Another thing you can do once you've set up your competitor notebooks is to automate finding what they're up to by setting up a Google Alert. A free service from Google, Alerts lets you create automated monitoring for specific keywords that you're interested in - for instance, the name of a competitor, like XYZ Consulting. When a new hit is found by Google, you'll receive an alert via email with a link to what Google found - you didn't have to do any of that research yourself!

To integrate a Google Alert with Evernote, you'd simply set up a filter in your email program so that when one of your Alerts for a particular competitor comes into your email, to automatically forward it to your Evernote email address. Those emails will then create new notes in your default notebook, where you can them move them to the correct competitor notebook.

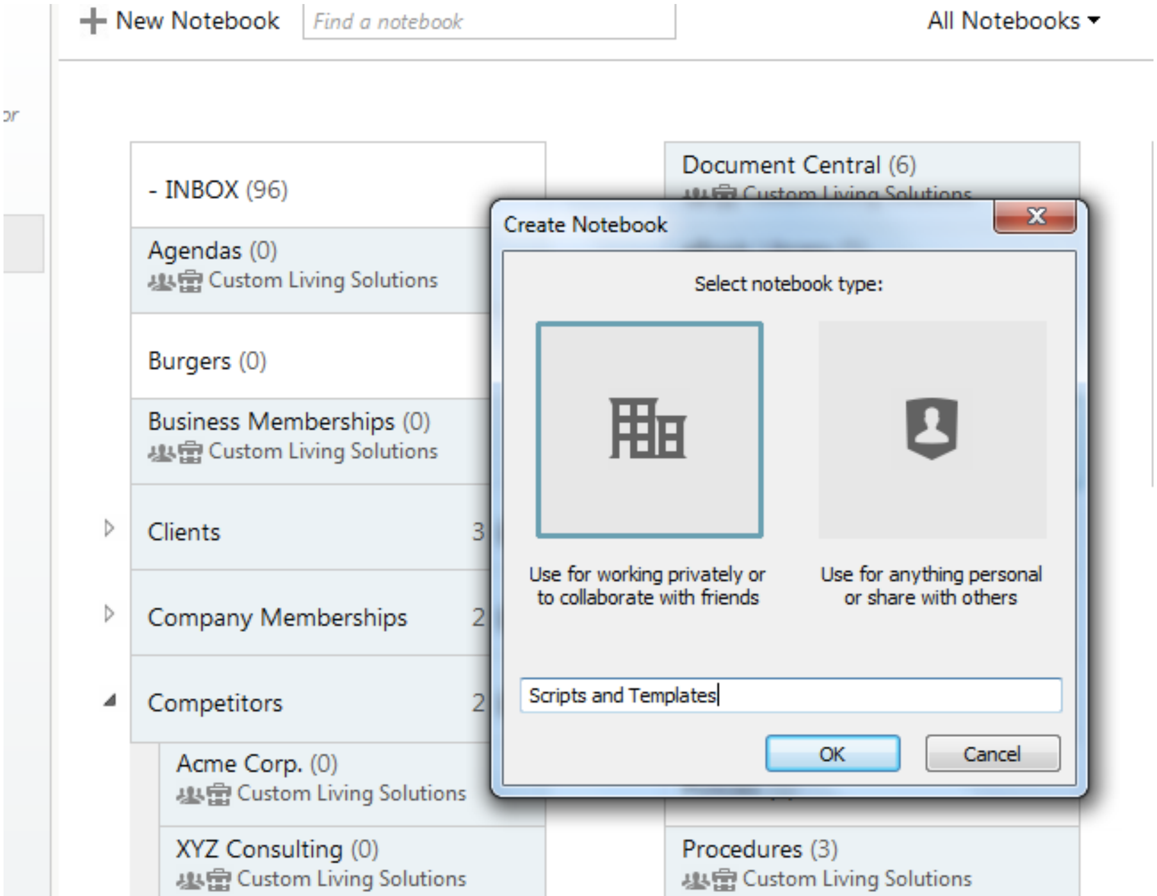
What’s My Line?

One of the biggest timesavers that a business can implement is to recognize when something is being repeated and then systematize it. This is especially true with communication. In your business, maybe your team has to say the same things to customers over and over or send similar messages to clients. if your standard messaging isn't written down and accessible to everyone, chances are that your team is reinventing the wheel (or at least part of it) each time those same messages have to be delivered. Additionally, without a set of standard messaging, consistency isn't being controlled.

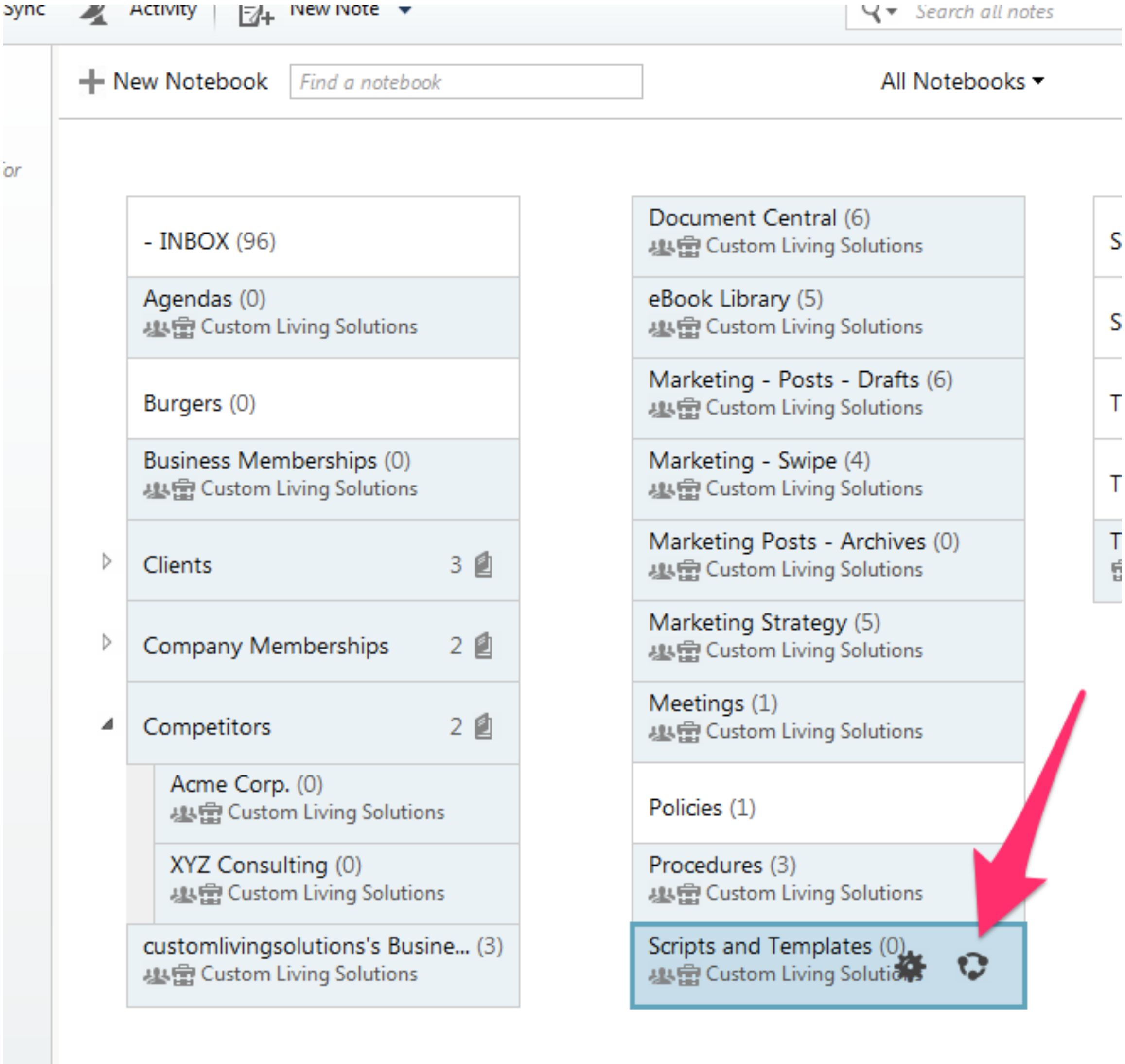
In your business, review what messages you and your team are repeating - whether via voice on the phone, or via email, and look at how you can create some standards or guidelines. For voice communication, these would be scripts, and for text communication, you'd create reusable templates.

Of course, these can be stored and shared via Evernote. Depending on your business, you can choose to have people adhere closely to the scripts that are created and the templates that are drafted, or perhaps your team gets more leeway in making them "their own." But regardless of level of flexibility, it's helpful for everyone to have some guidelines to follow.

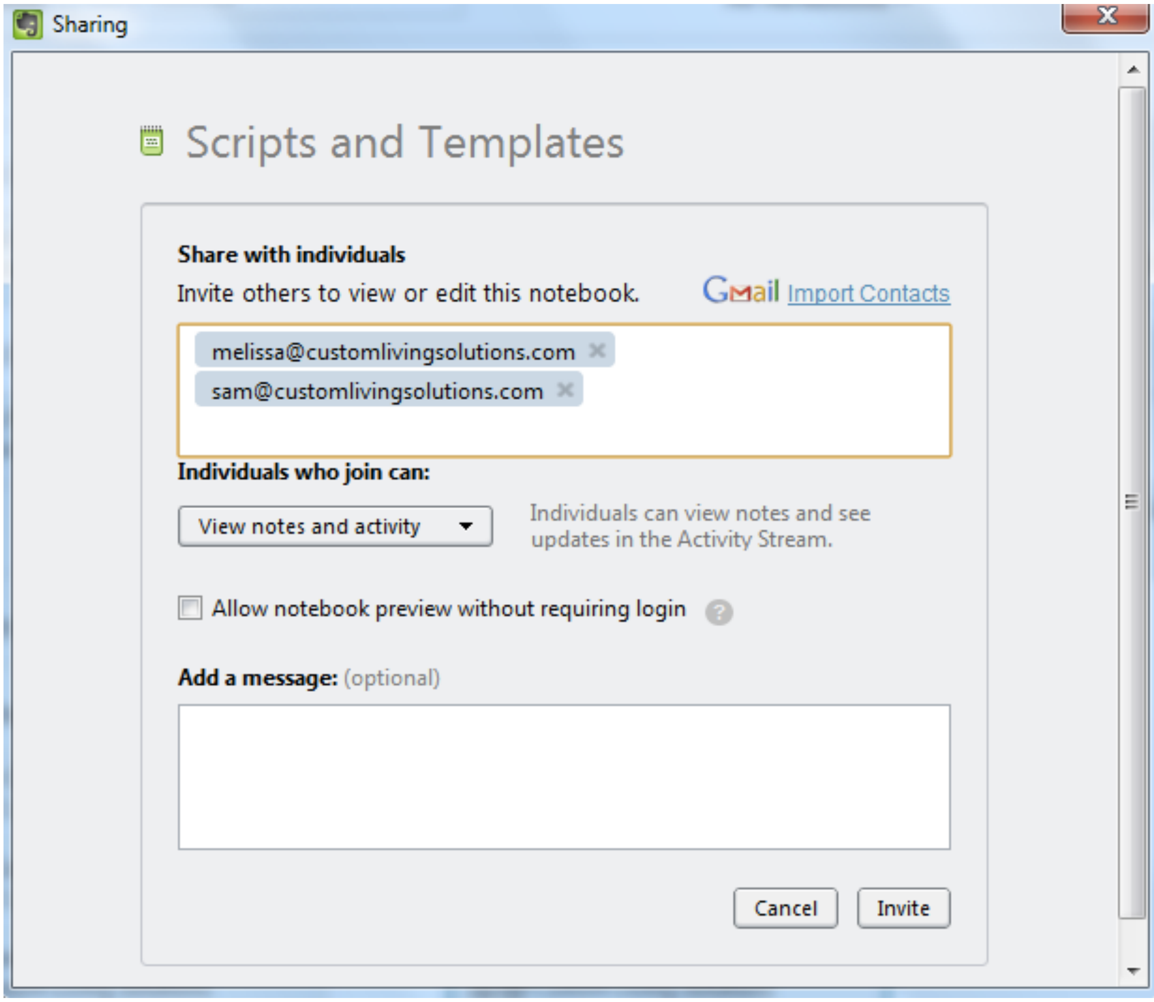
Let's look at how to use Evernote to centralize these scripts and templates. Start by creating a new notebook called "Scripts and Templates."



We want to share these scripts and templates with the people on my sales and marketing team. Click on the "Share" button.



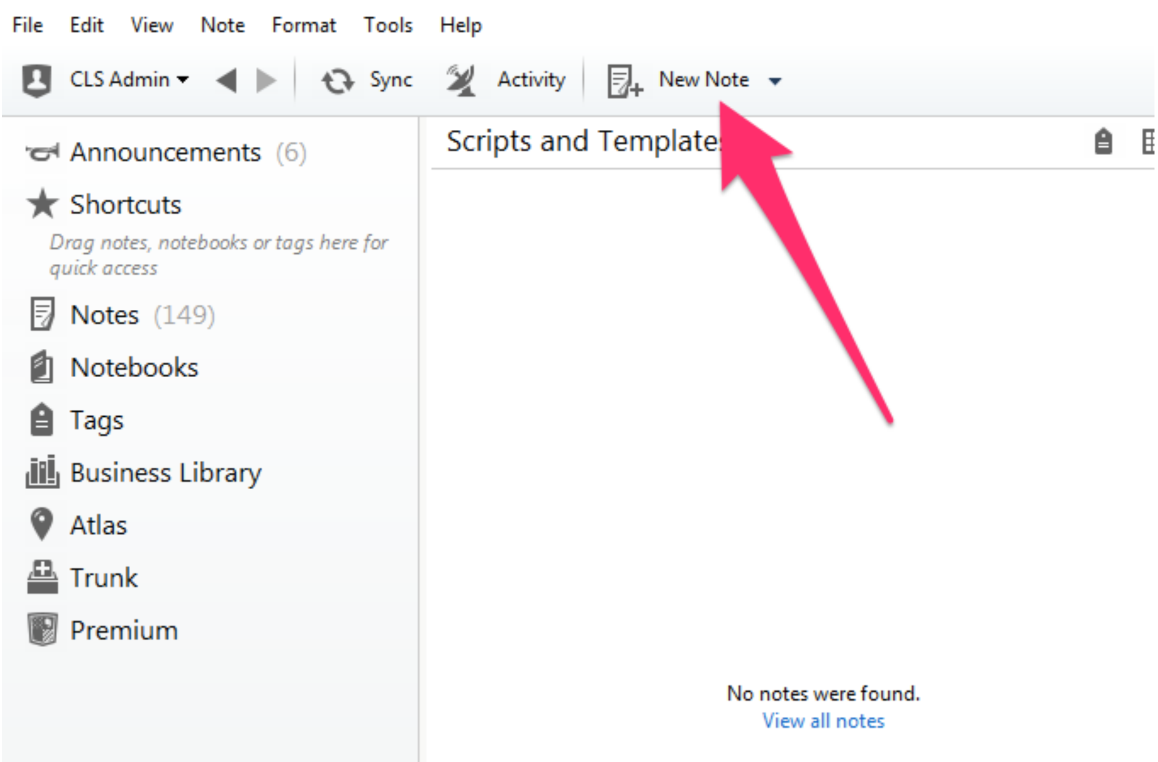
First, we’ll enter the email addresses of the team members we’re inviting. We want everyone to be able to see the notes, but not necessarily to edit them. Let's set the permissions to "View notes and activity." This way, notes can be seen, but not changed or deleted.



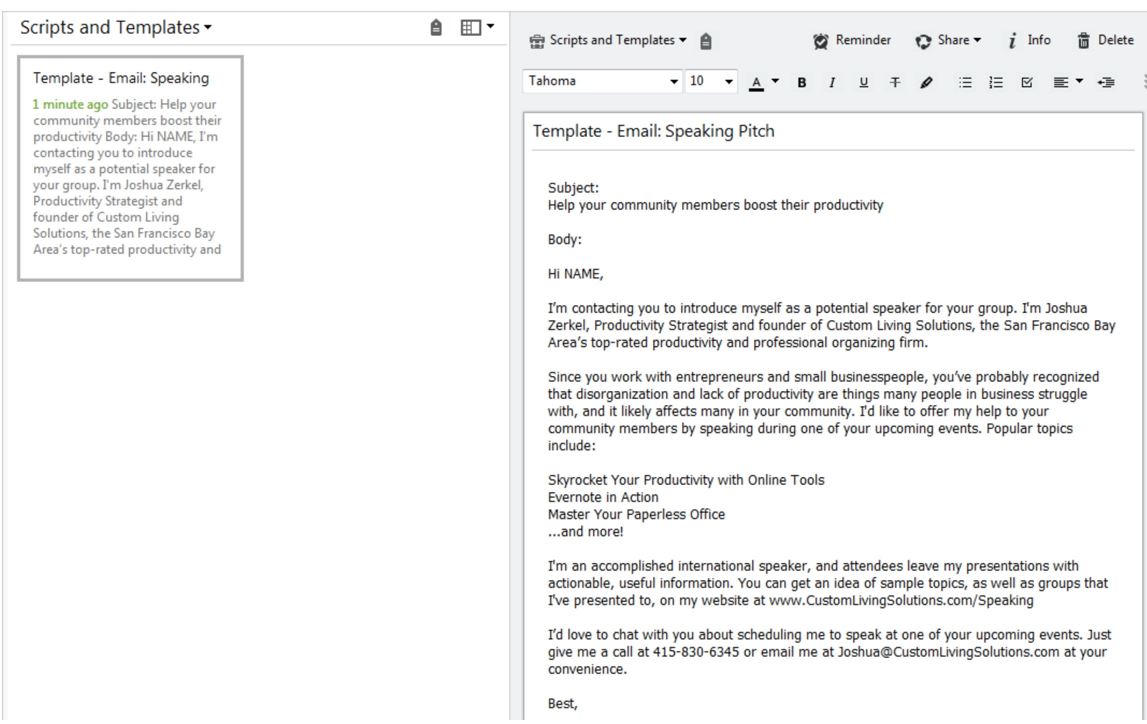
Once we've created the notebook and set permissions, now we need to fill it with our scripts and templates. Since many of us spend so much time in email, it's often easier to start creating email templates than it is for us to create phone or voice scripts. Think about the email you write. Do you say find yourself retyping the same (or similar) messages over and over? These make ideal templates!

For example, I do a lot of public speaking. While I'm frequently invited to speak at various events, I still do outreach to generate new speaking events as well. Rather than rewrite an introductory email every single time I want to meet the speaker host for a group, I've created a template that I (or an assistant) can use to make that initial contact.

I'll create a new note in Evernote for this template.



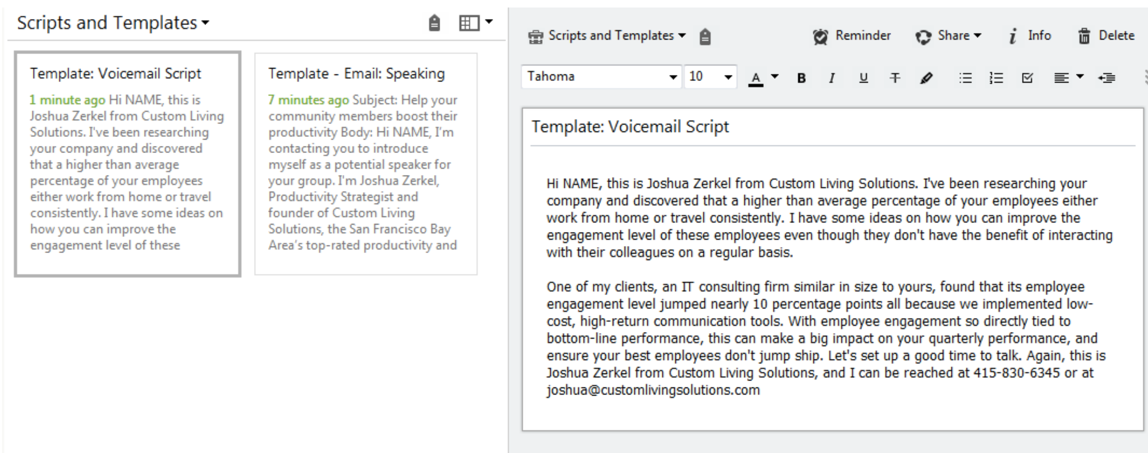
Then I'll write in the content of the template. To make it clear that it's an email template, in the title I'll write "Template - Email: Speaking Pitch," then fill in the body of the note with my email text.



Anytime I need to send a new introductory email, I can just copy the text from Evernote and paste it into my email program. A few modifications of the text to customize it for the recipient, and I'm done.

The process works similarly if you're creating a phone or voice script. Think about the things you or your team says frequently. If something is being repeated more than a few times, it's helpful to create at least a basic script for consistency's sake.

In the example below, I've created a phone script for when a salesperson calls to engage a potential client and reaches their voicemail. I don't want them "winging it" each time, so I wrote a script to follow. Of course, they don’t have to say it verbatim - but at least it's clear what points I want them to leave on a voicemail.



The "Scripts & Templates" notebook may take some time to build, and it will likely be an ongoing process. New scripts and templates can be added as needed, and old ones can be modified or removed as your business changes.

Spreading the Word – Action Plan

In this section, *Spreading the Word,* you learned how to:

- Create and use a marketing calendar to keep your team - and your marketing - on track
- Centralize, draft, and archive your social media and online marketing efforts
- Capture and store many different types of ideas and inspiration for your marketing
- Keep track of your competitors
- Standardize your communication efforts

Now it's time to take action!

What do you need to do or put into place to start using Evernote for your marketing efforts?

What is the first thing that should be accomplished?

Who would be responsible for implementing that?

What tools are needed to complete the task?

What is the deadline for getting this implemented?

Who will verify that this has been completed?

Part 5

The Money Thing

$toring your Dollars

Most businesses need to focus on money - without it, you don't really have a business at all! Whether your company is a for-profit endeavor or a non-profit, you still need to track the money that's coming in and the money that's going out.

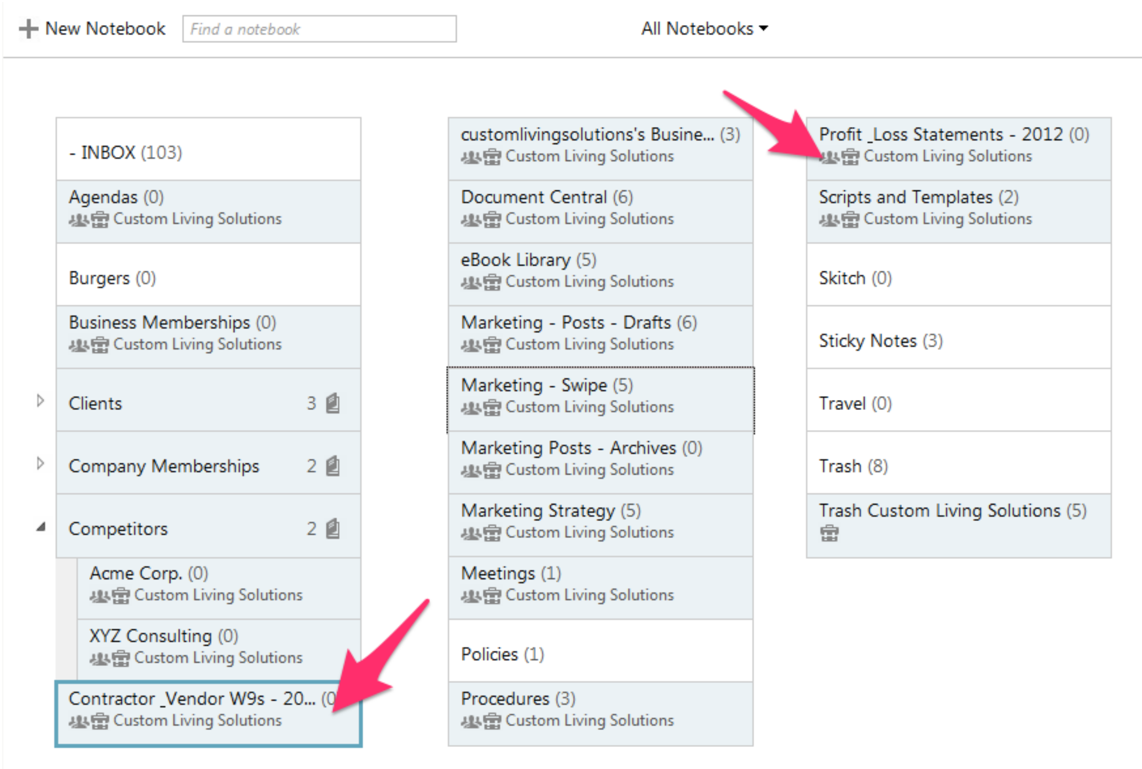
There are many applications and programs that can help you monitor the money in your business (watching the inflows and outflows, for instance) - and Evernote is NOT one of them. However, it can be a very helpful place to centralize and store the financial records of what's going on with your business. For instance, if your finance department or bookkeeper generates profit and loss statements, keeping them in Evernote makes it easy for the appropriate people on your finance team to access them. Likewise, if you work with subcontractors or vendors, keeping their W9s and other related information in a notebook in Evernote makes it easy to take appropriate steps during tax time.

The most straightforward way to organize financial information in Evernote is to create one notebook stack for each year, then add notebooks in the stack for subcategories.

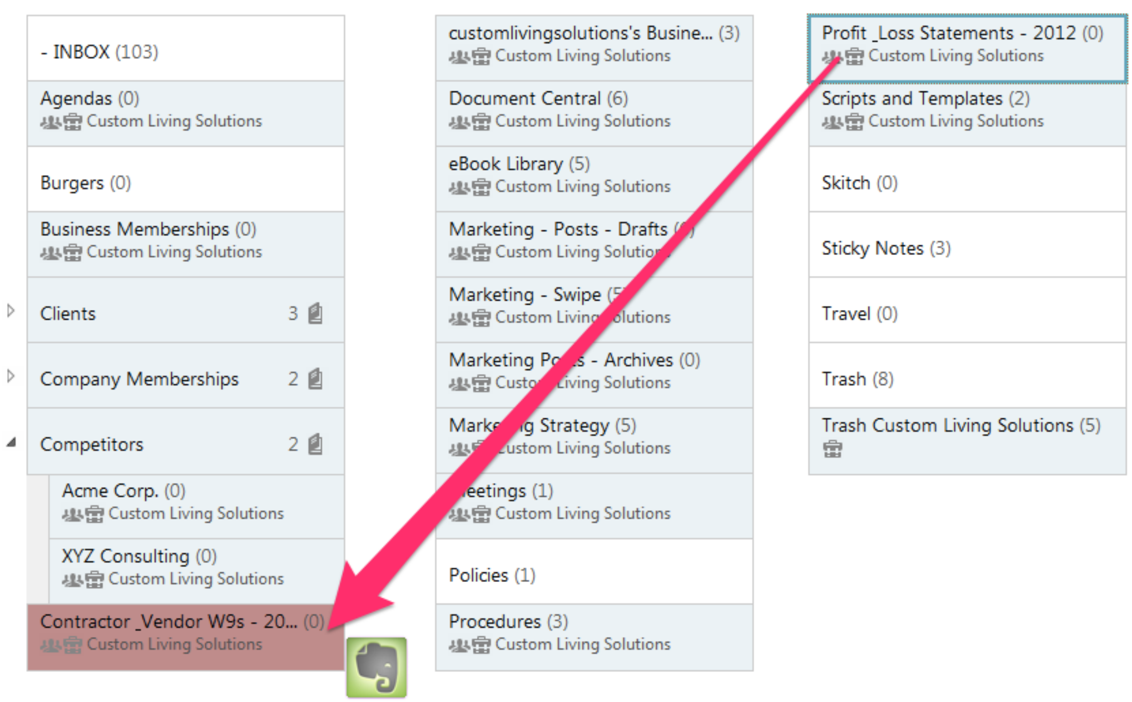
Some subcategories you may want to create notebooks for might include:

- Contractors and vendors
- Profit and loss statements
- Equity and stock information
- Annual reports
- Balance sheets
- Financial projections
- Budgets
- Estimates

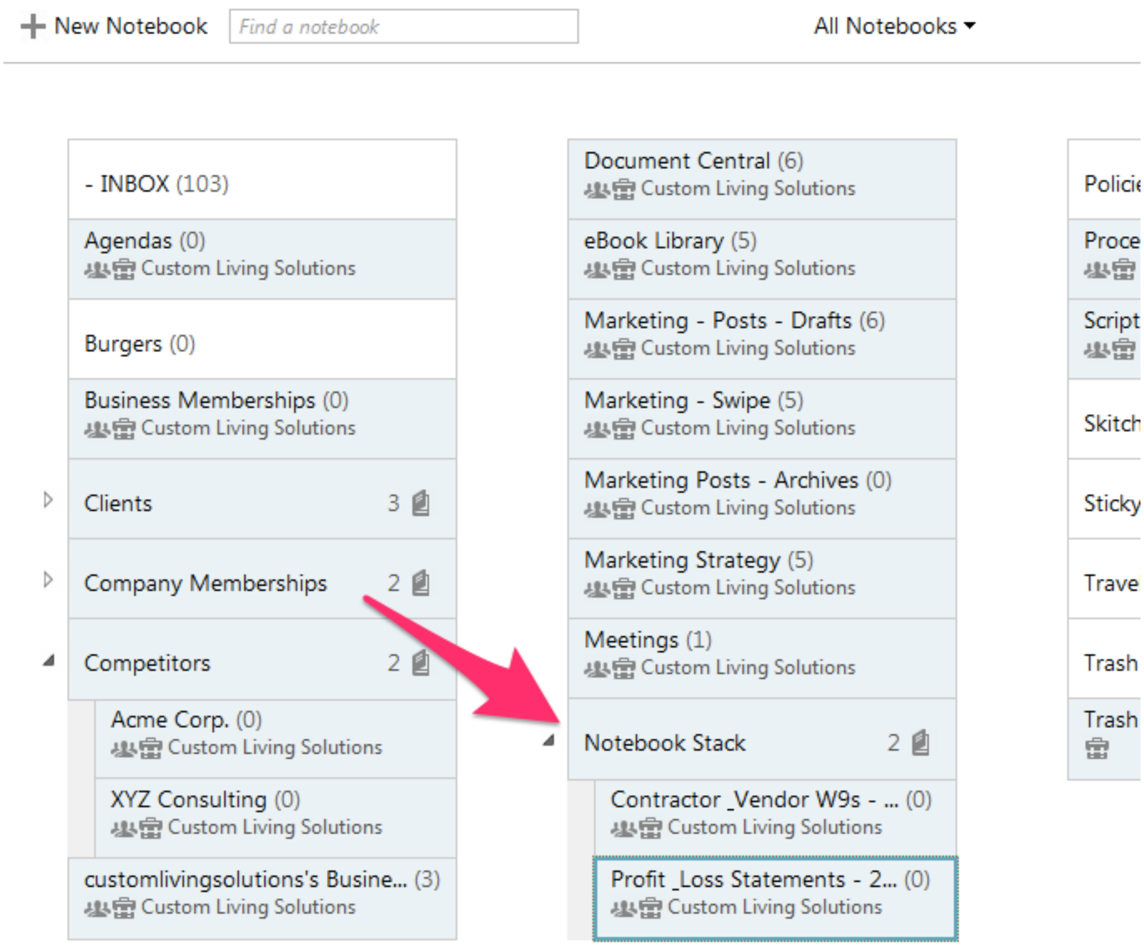
Start by creating a new notebook called "Profit & Loss Statements – 2012” and then another notebook and called "Contractor & Vendor W9s - 2012."



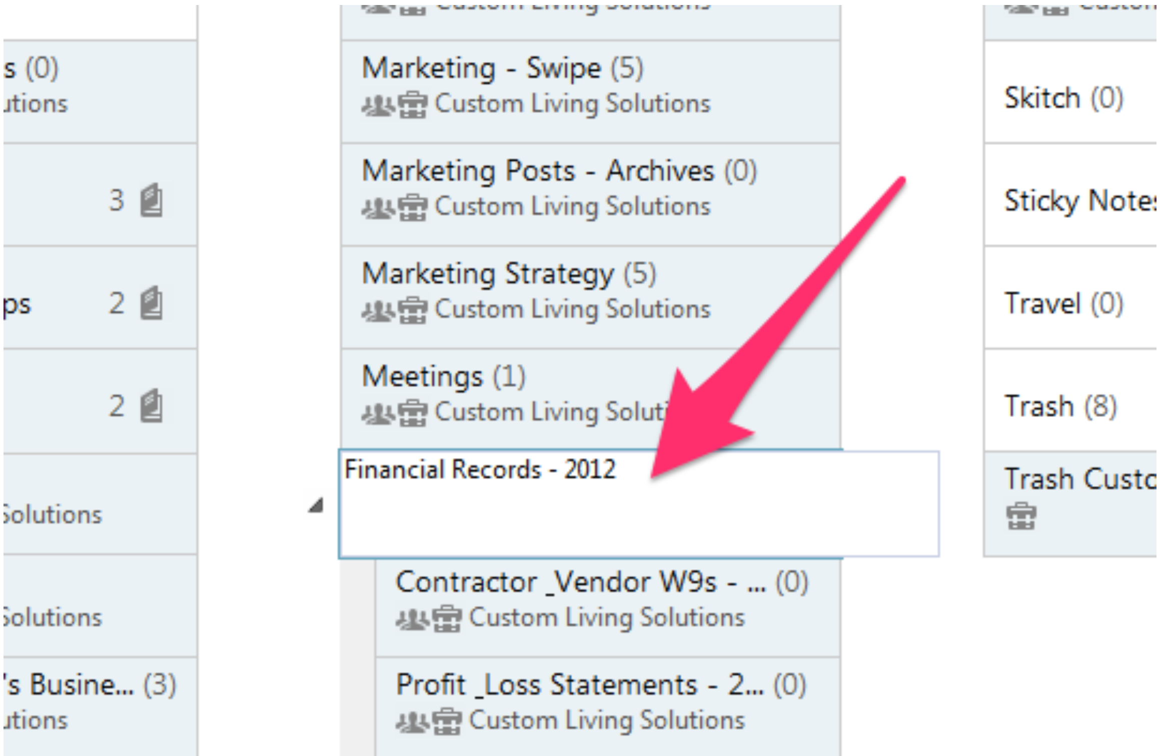
Since we want these to be grouped, let's create a notebook stack from them. Drag the "Profit & Loss Statements - 2012" on top of the "Contractor & Vendor W9s - 2012" notebook.



This will create a new notebook stack called "Notebook Stack."

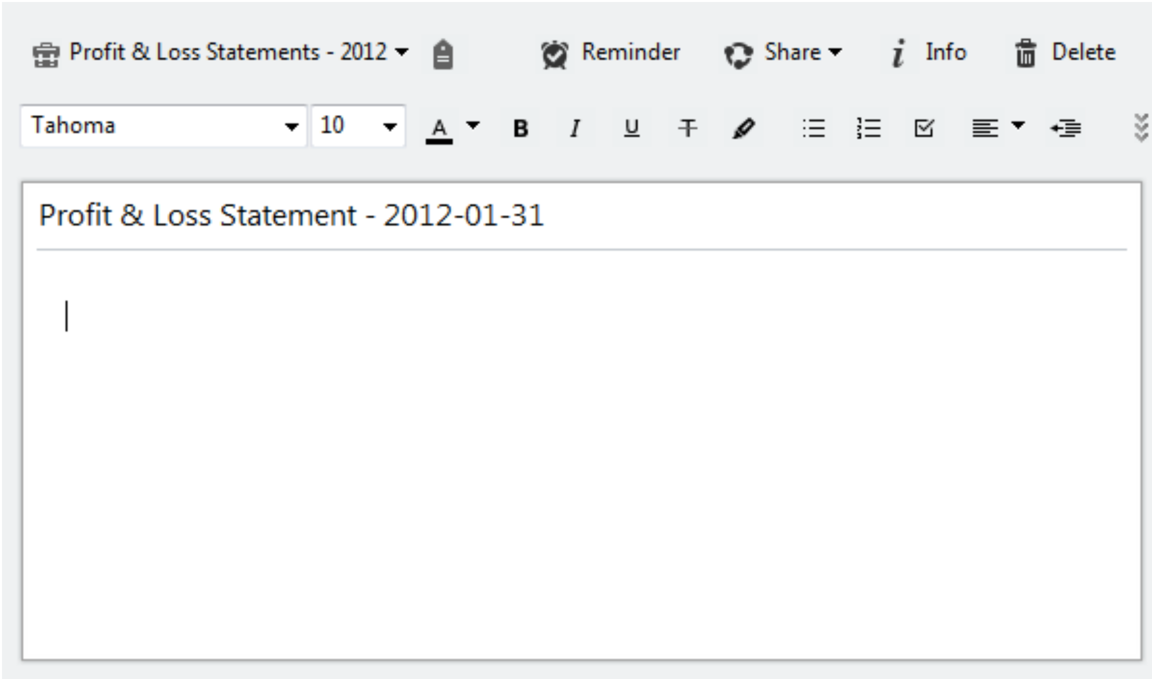


Let's rename "Notebook Stack" to "Financial Records - 2012" by right-clicking or control-clicking on the stack then selecting "Rename."

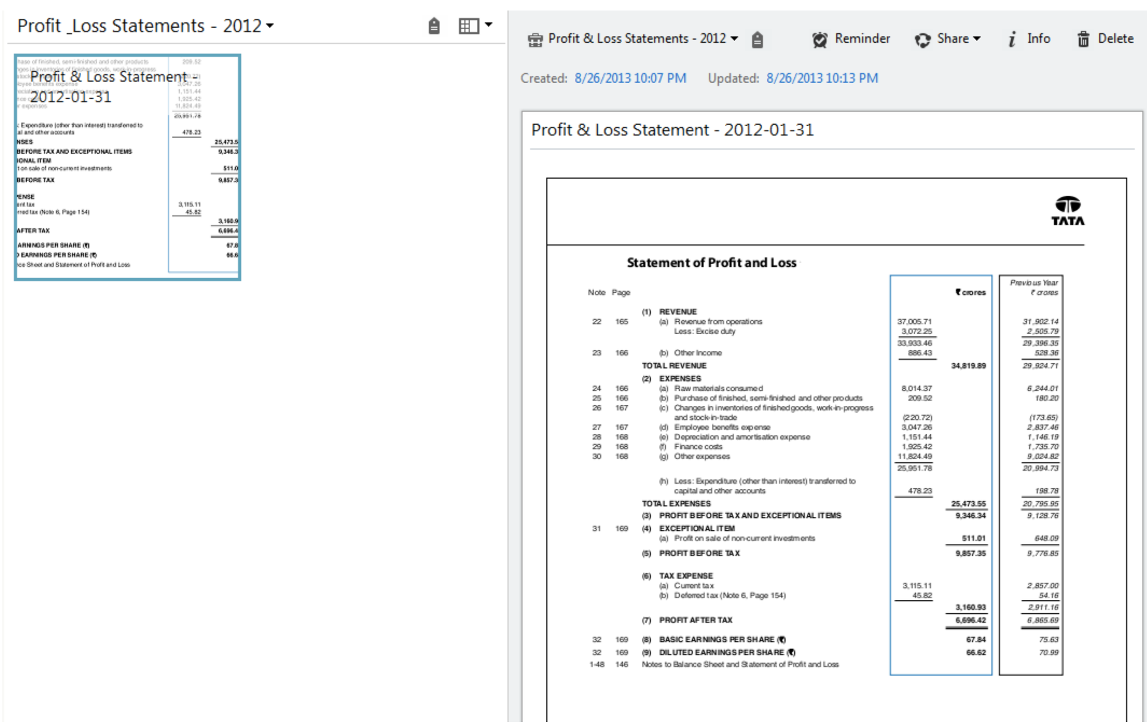


If you wanted to share these notebooks with other people in your company - for instance, other members of the finance team or group - you'd need to use the sharing controls on each notebook to invite individuals. You can't currently share a notebook stack.

Now lets add some reports to the "Profit & Loss Statements - 2012" notebook. Open that notebook, and create a new note and title it "Profit & Loss Statement - 2012-01-31."



Now that the note is created with the title we want, let's bring in an actual report. I'll open a folder with previously created financial reports, and drag in the one from January 2012 on top of this note.



Now the note contains the statement, and it can be permanently viewed inside of Evernote. Of course, since it's in Evernote it can be easily shared with anyone who needs to see it - whether someone in your own company (the boss, perhaps?) or someone outside your company (a third-party tax advisor, for instance).

To populate your notebooks, drag in your reports, statements, and other financial-related information, and share the notes/notebooks as appropriate.

There are other types of financial information that may be more appropriate to share with your entire company. For instance, if your company participates in a stock or equity-based incentive program, details of the program could be stored in Evernote so employees could easily find them, and can be shared via a Business Notebook.

The Big Payback

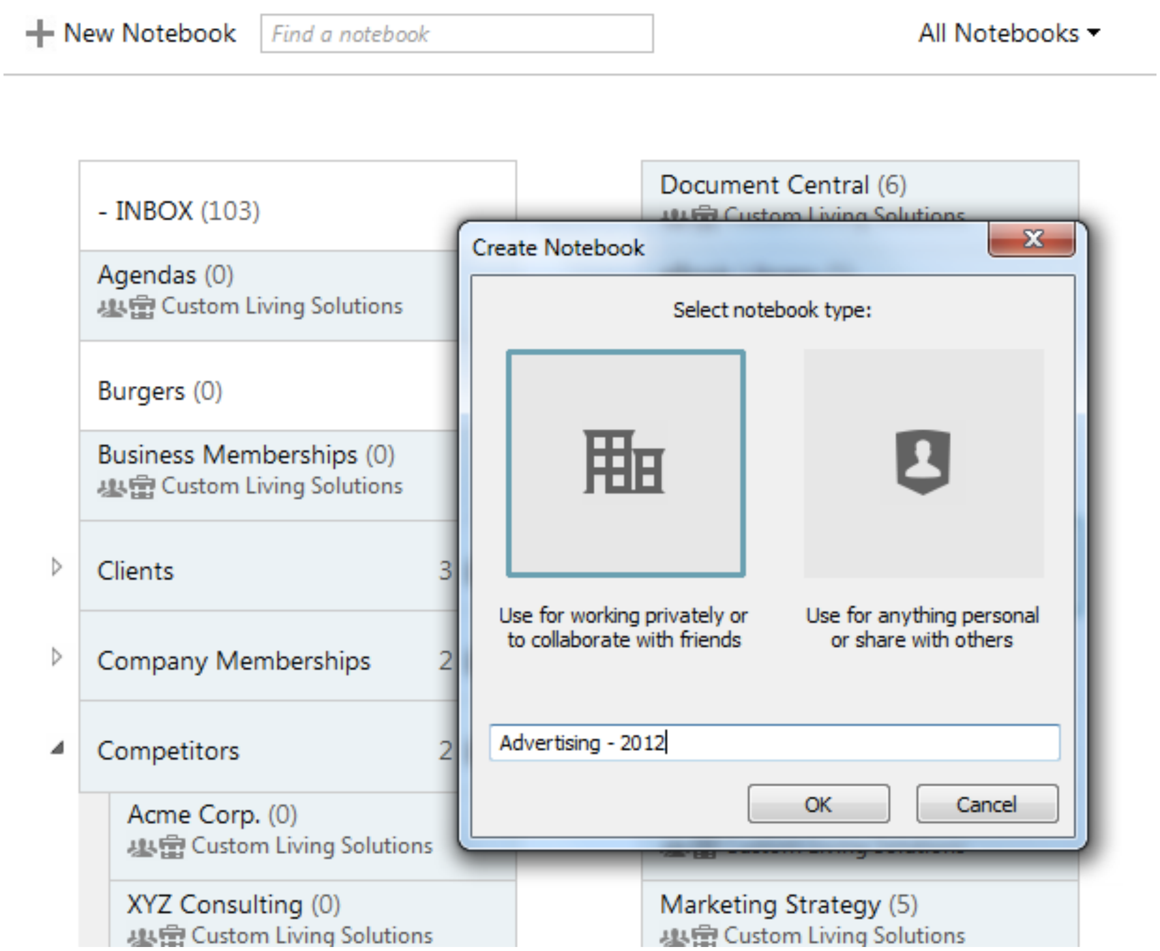
Hiding inside the wallet, bag, briefcase or purse of your team members are likely lots of dollars - dollars in the form of expenses. Typically, receipts and other expenses that are due for reimbursement are handled in a scattershot way at best - and late, or not at all, at worst.

Evernote can help you and your team members keep records of expenses incurred, and if they're due for reimbursement, Evernote can help with that too!

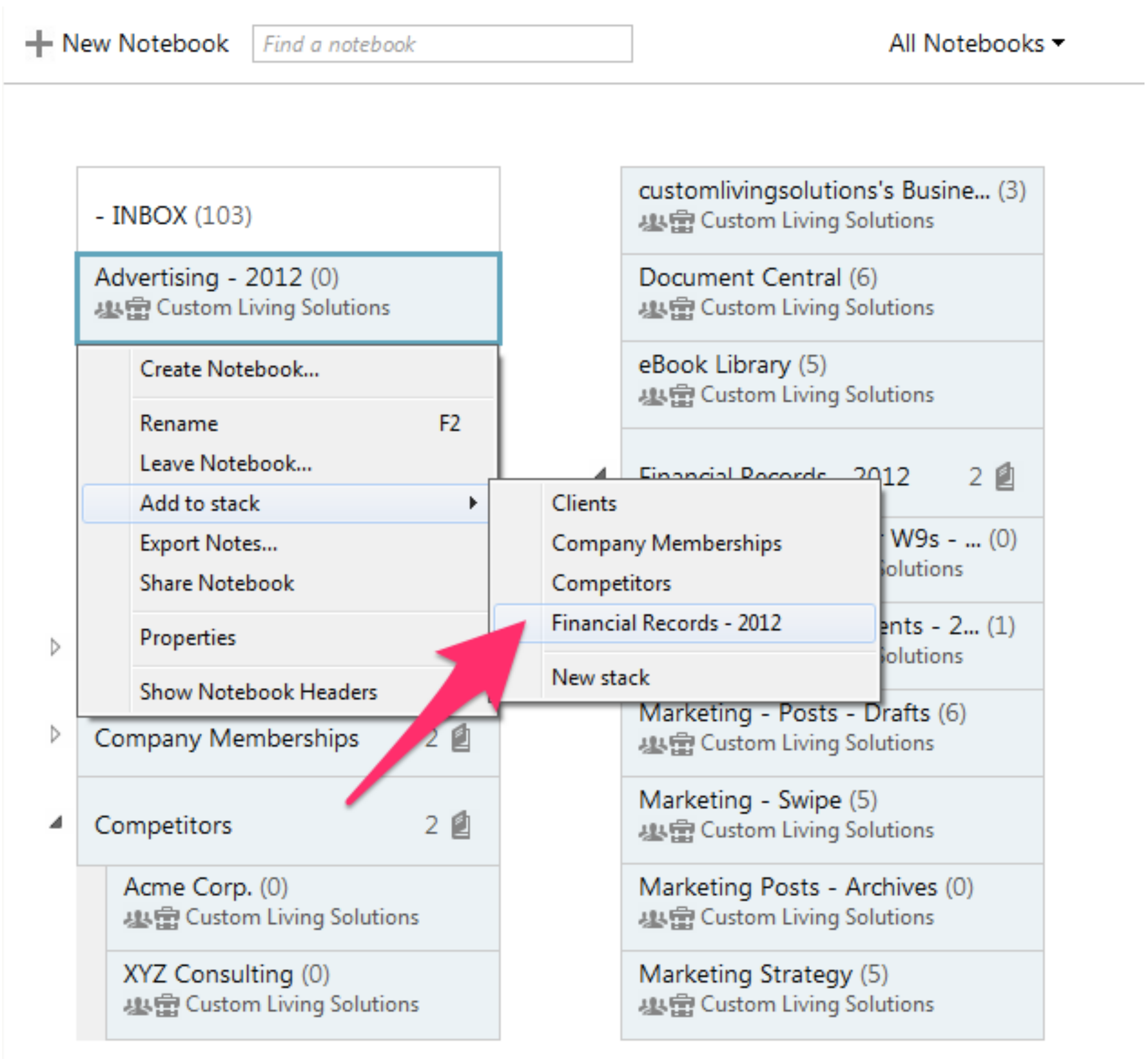
First, you'll want to create a master notebook stack for each year's financial records (see *Chapter 28 - $toring Your Dollars* for details). Then, this notebook stack can contain notebooks for each major expense category.

Reusing the "Financial Records - 2012" notebook stack that we created in the previous chapter, let's add some notebooks to the stack for a few of our expense categories.

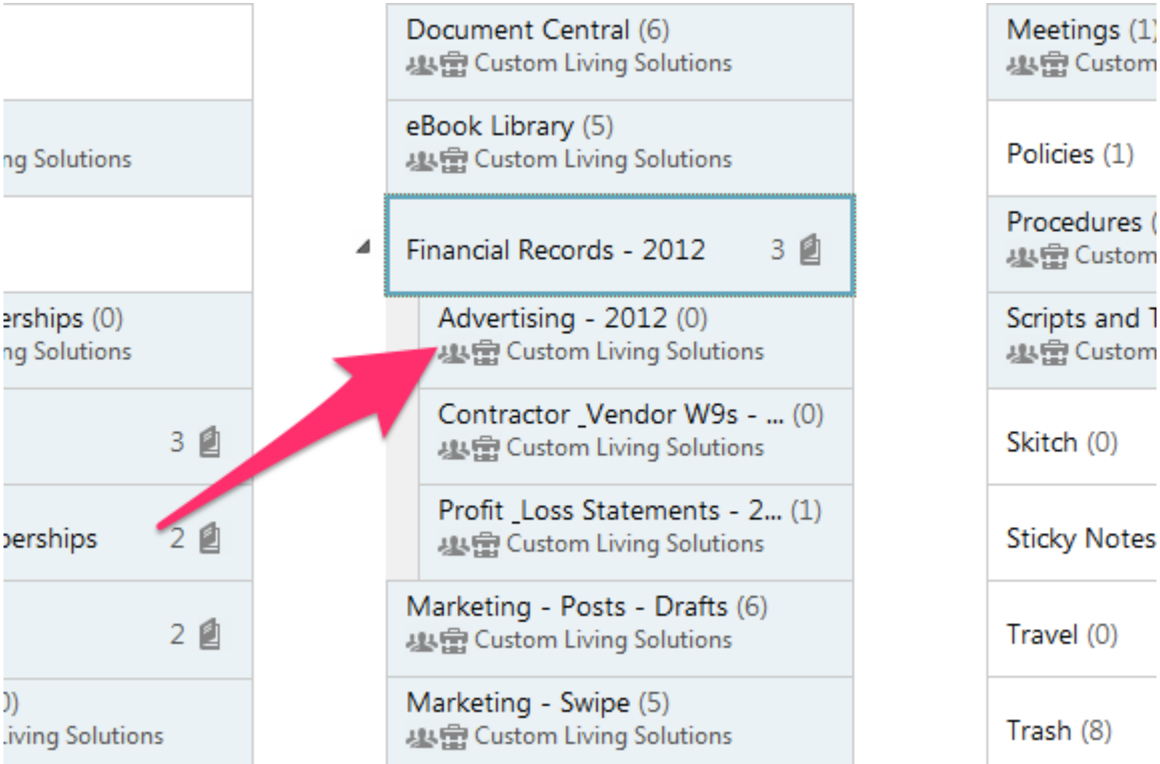
Add a new notebook and name it "Advertising - 2012."



Now let's add this notebook to the "Financial Records - 2012" stack that we created in Chapter 28. Right-click or control-click on this notebook. A pop-up menu appears. Click on "Add to Stack" then on the "Financial Records - 2012" notebook stack that we previously created.

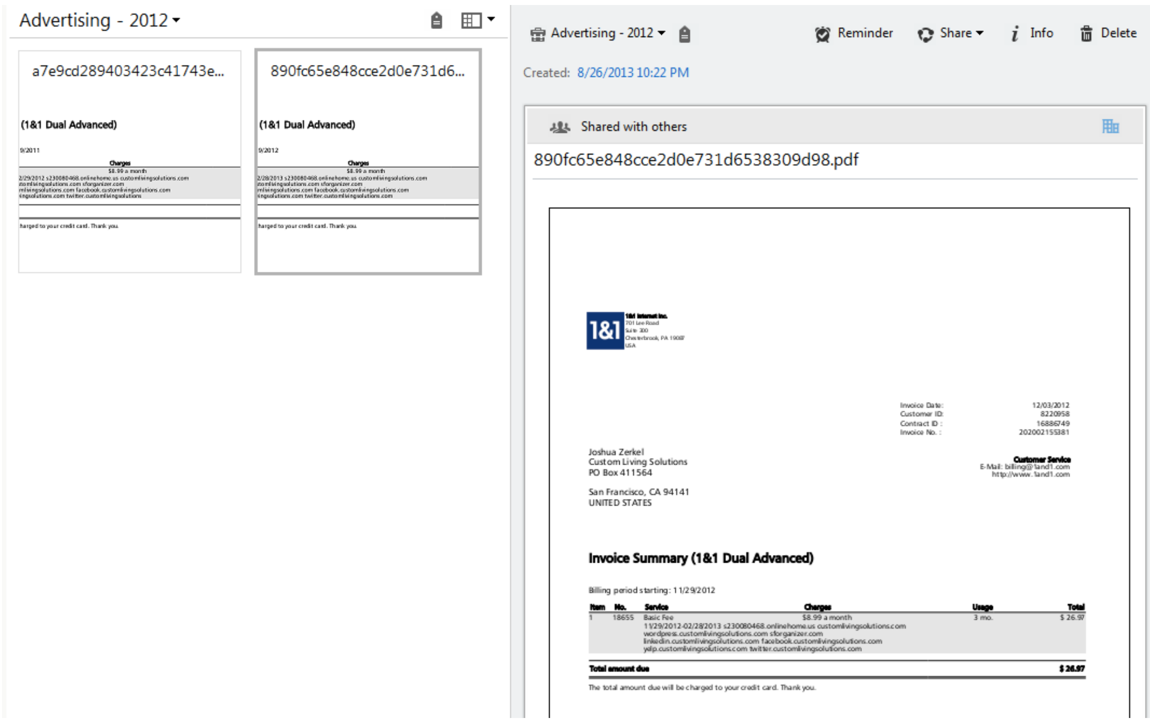


This moves the notebook directly into the stack.



Of course, you may also drag this notebook on top of the "Financial Records - 2012" notebook stack. It's up to you!

Now that we have the "Advertising - 2012" notebook created, let's add in some expenses to it. I've previously scanned a couple of invoices from my web hosting company, and I'd like to store them in Evernote. I'll drag them to the "Advertising - 2012" notebook, which creates new notes for them.



At this point, you may choose to retitle each note, or leave as-is - it's up to you (and your company's policies and procedures). Since Evernote makes the contents of your notes searchable, you can always just search for the vendor name later if you ever needed to find this invoice again.

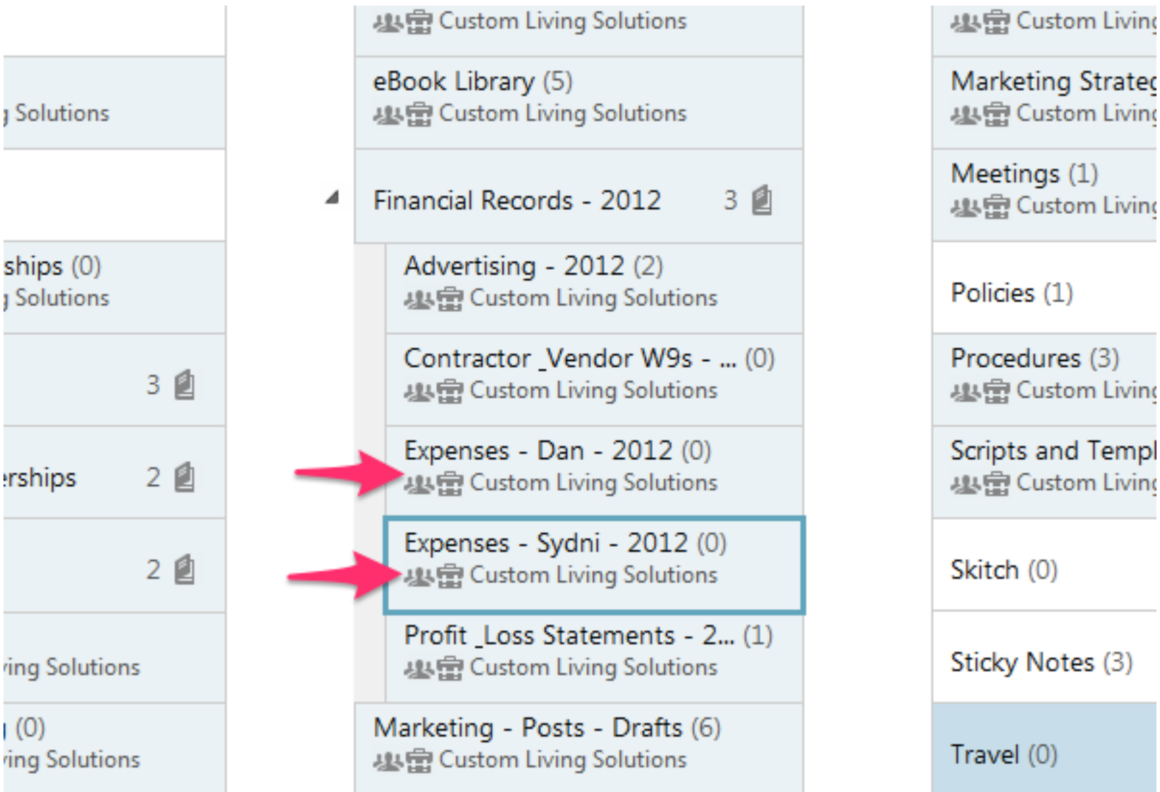
Remember, you can also use the Evernote mobile app's Page Camera function to snap photos of receipts, drag in photos of receipts or documents that you took with a regular camera, or you can scan receipts using a desktop or portable scanner. Since Evernote can capture virtually anything, there's no excuse to not keep track of your company's expenses - no matter the source!

If you don't want to rely on scanning receipts and invoices yourself, Shoeboxed will do the scanning for you and will send all your documents to Evernote. Check out all the details on Shoeboxed in *Chapter 14 - Creating a Digital Filing Cabinet.*

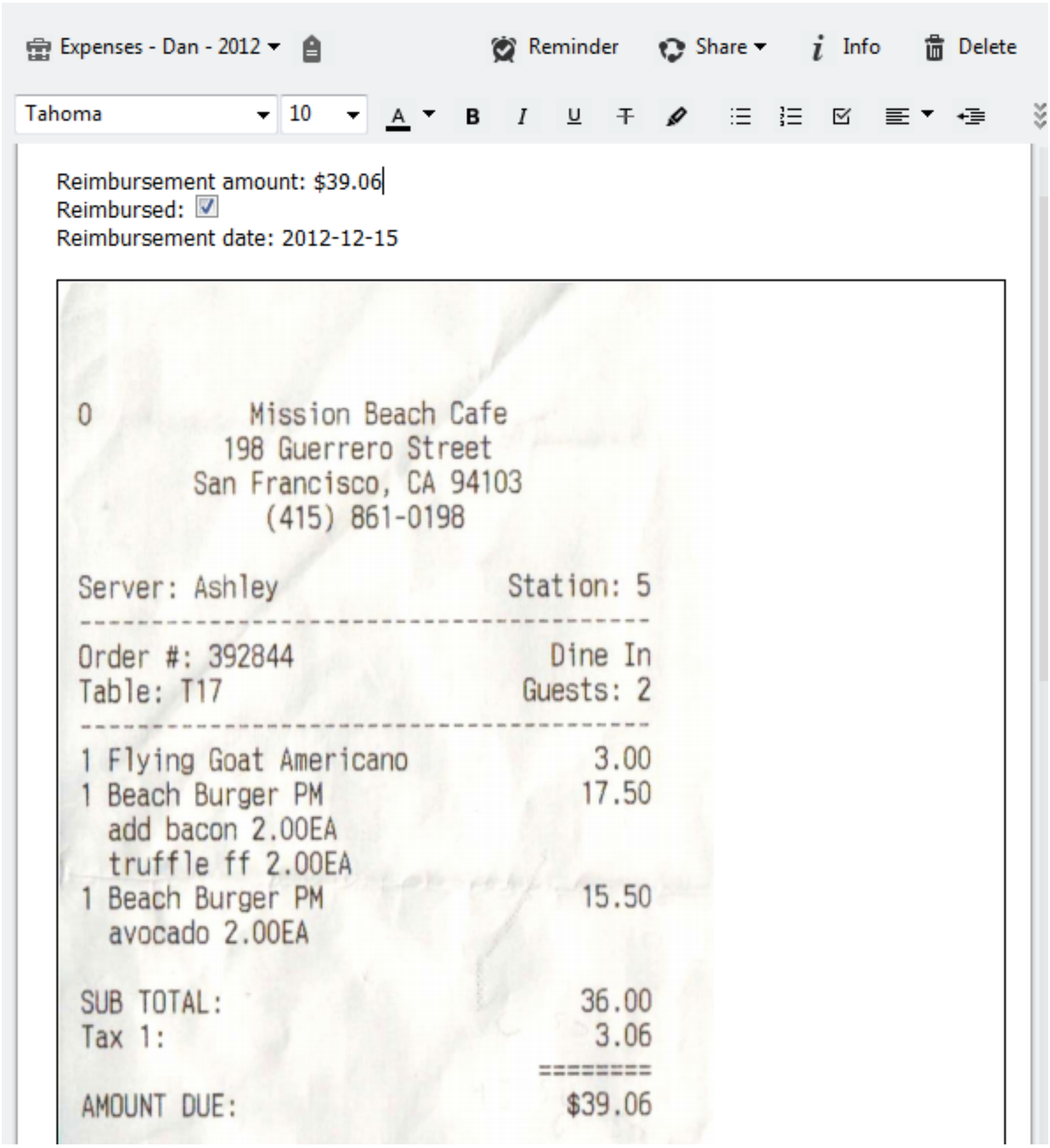
Create as many notebooks as you need to keep track of the various expense categories that your business has, and put them in the notebook stack for the year that you're keeping track of. If you don't already have a good sense of what your expense categories are, consult with your bookkeeper or tax advisor for ideas. I've put a list of some sample categories in the Appendix.

It's likely that some of your team members are incurring expenses individually that they're looking to be reimbursed for. There are two ways to simplify this process both for the person who submitted the expenses and for the person who needs to approve the expenses.

The first method is to give each team member his or her own notebook in Evernote, within the master financial notebook stack for each year (in our example, it would be within the "Financial Records - 2012" notebook stack). The notebook would then be shared with the group or individual responsible for reviewing and approving expense reimbursements.



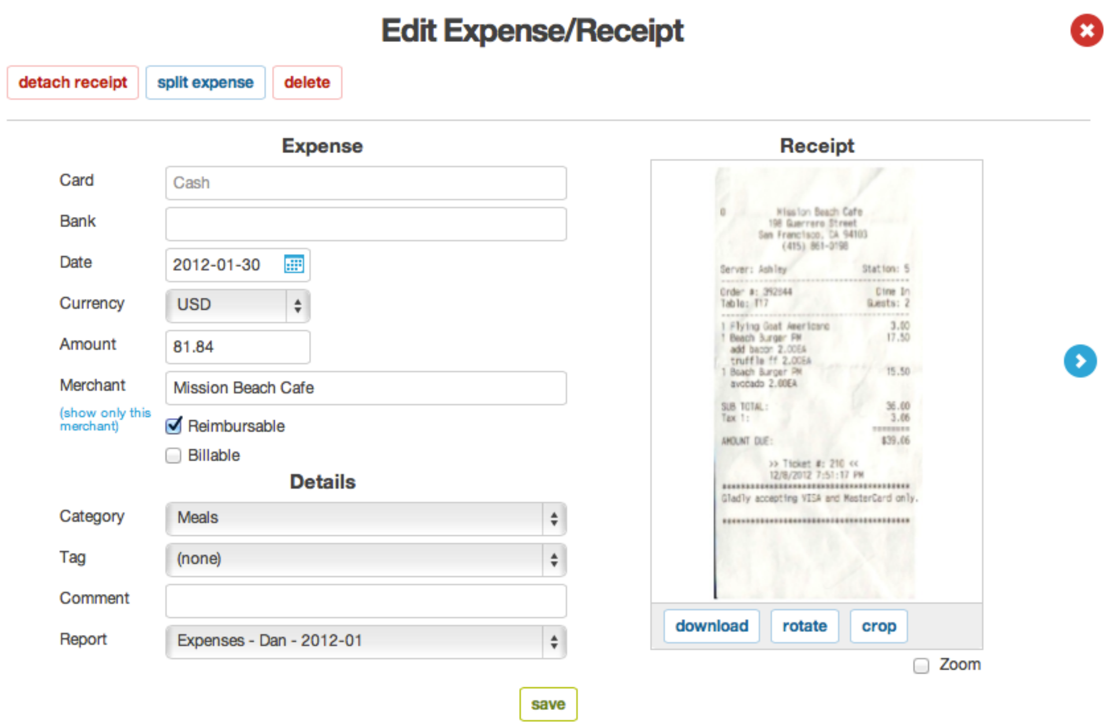
Create notes for each reimbursement claim, including photos or scans of receipts. At the top of the note, you can add details about the amount of the requested reimbursement, whether it was reimbursed (along with a checkbox to denote its status), and the date of reimbursement. This way, the person asking for the reimbursement and the person responsible for approving it can work off of the same note.



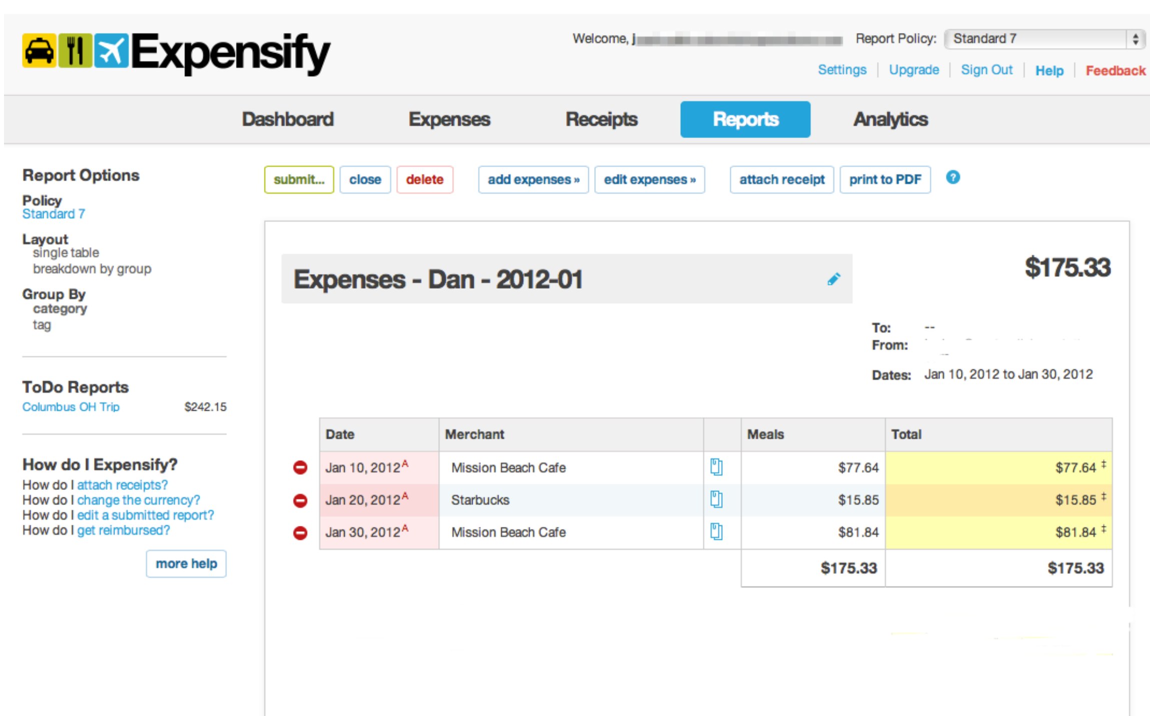
Another method to process reimbursements and receipts in Evernote is to use Expensify, which collects receipts and expenses and generates expense reports from them.

When you sign up your team with Expensify, each person gets the option to link their Expensify and Evernote accounts. If they do, an Expensify notebook is automatically created in their Evernote account. Any receipts that are put into the new Expensify notebook automatically create expense entries in Expensify.

Here's what the expenses now look like inside of Expensify.



From here, the team member can create and submit an expense report from within Expensify, and the person responsible can approve it (or not). Expense reports from Expensify can also be sent to Evernote for archiving.

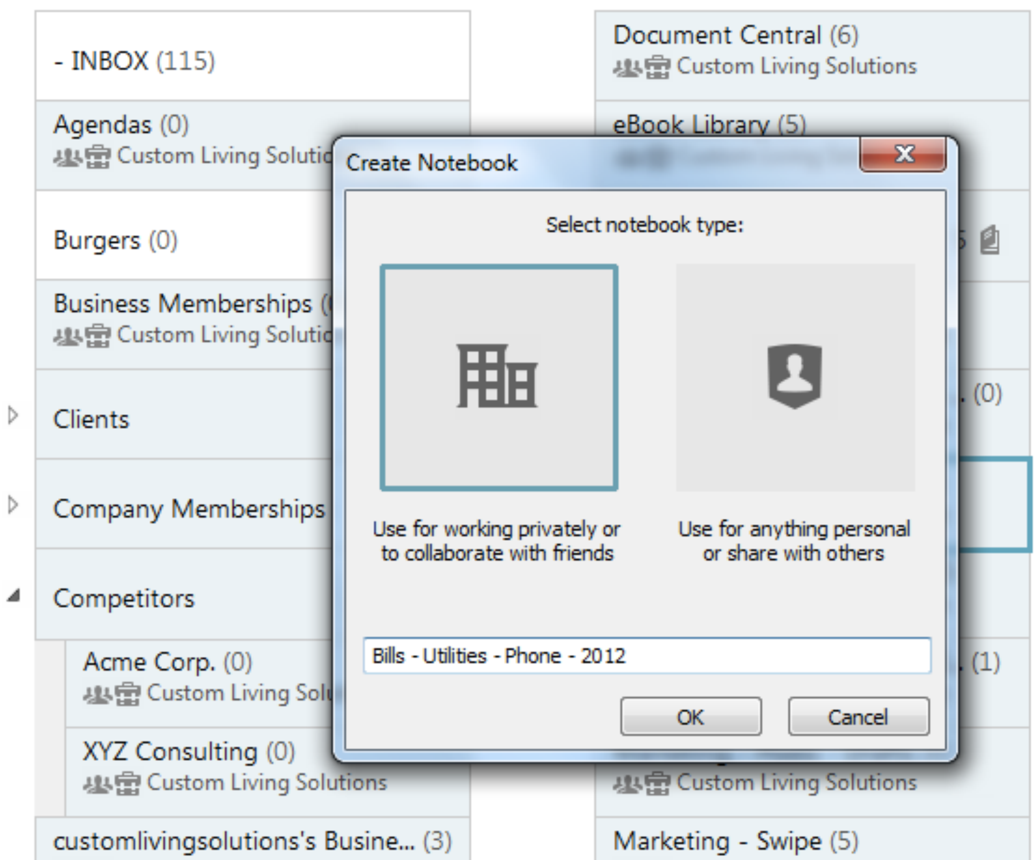


Bills, Bills Bills

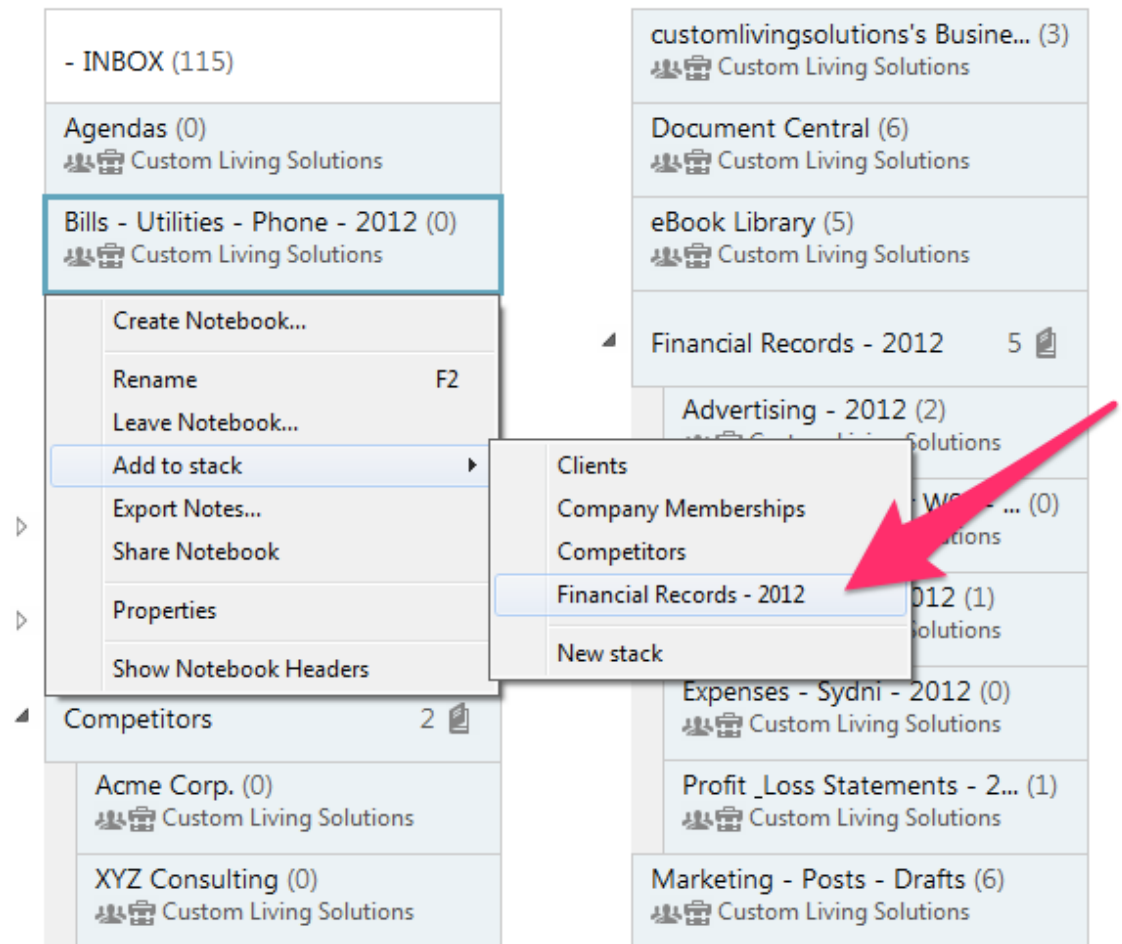
In addition to reports, vendor information, and expenses, your business is likely receiving bills and other financial statements. Just like those other categories of financial information, bills and statements need to be kept track of. Evernote is a great place to store these types of financial information as well.

There are two ways to accomplish getting your bills and statements into Evernote - manually or automatically. Manually involves someone on your team downloading the statements and bills or scanning them in, then sending them to the appropriate Evernote notebook for each item.

Start by creating a new notebook and name it "Bills - Utilities – Phone - 2012."

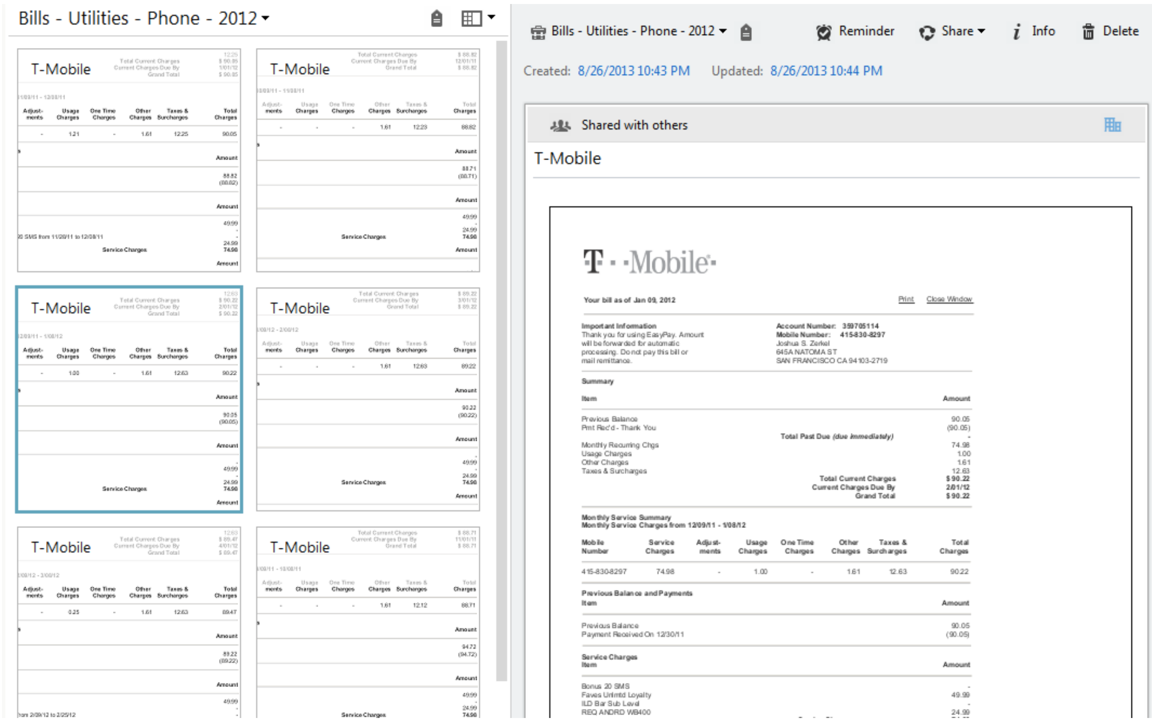


Let's add it to our "Financial Records - 2012" notebook stack by right-clicking or control-clicking on it, and selecting "Add to Stack" and then "Financial Records - 2012" from the pop-up menu.



Now the "Bills - Utilities - Phone" notebook has been added to the "Financial Records - 2012" notebook stack.

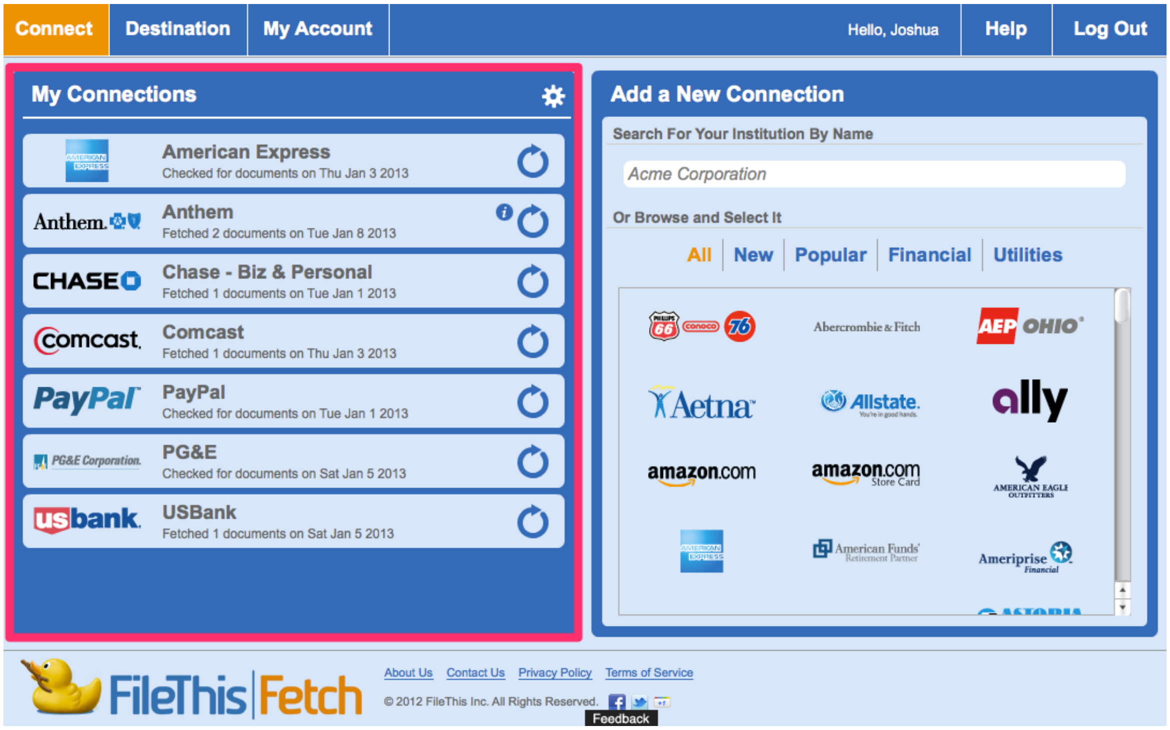
Now that we have the notebook where we want it, we need to add in the bills and statements that we've been downloading or scanning. I've been downloading PDF versions of my cell phone bills, and I'd like to add those to Evernote so I can keep all the financial records for my business together. To get these bills into Evernote, I'll open the folder with the PDF documents, then select and drag each onto the "Bills - Utilities – Phone – 2012" notebook to create new notes for each document that I've dragged in.



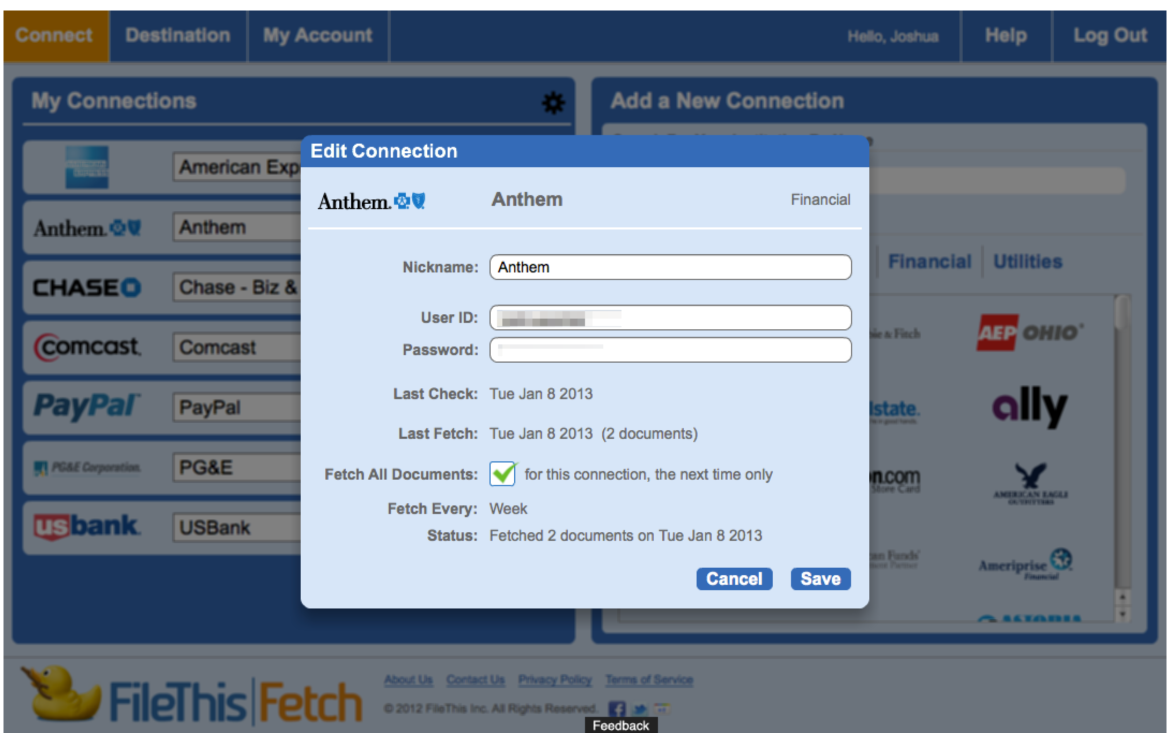
These notes can then be retitled to reflect the vendor or date, or can just be left as-is (they are already in a clearly labeled notebook). The original PDFs are still attached to each note, so I can always open the PDF in a separate PDF reader if I wanted or needed to. Since Evernote makes all the text on each document searchable, I can always search for "T-Mobile" if I couldn't remember where I put these bills.

For each vendor, bank, or utility you receive bills or statements from, you'd repeat this process of adding a notebook for it, moving it to a notebook stack, then adding in your scanned or downloaded documents.

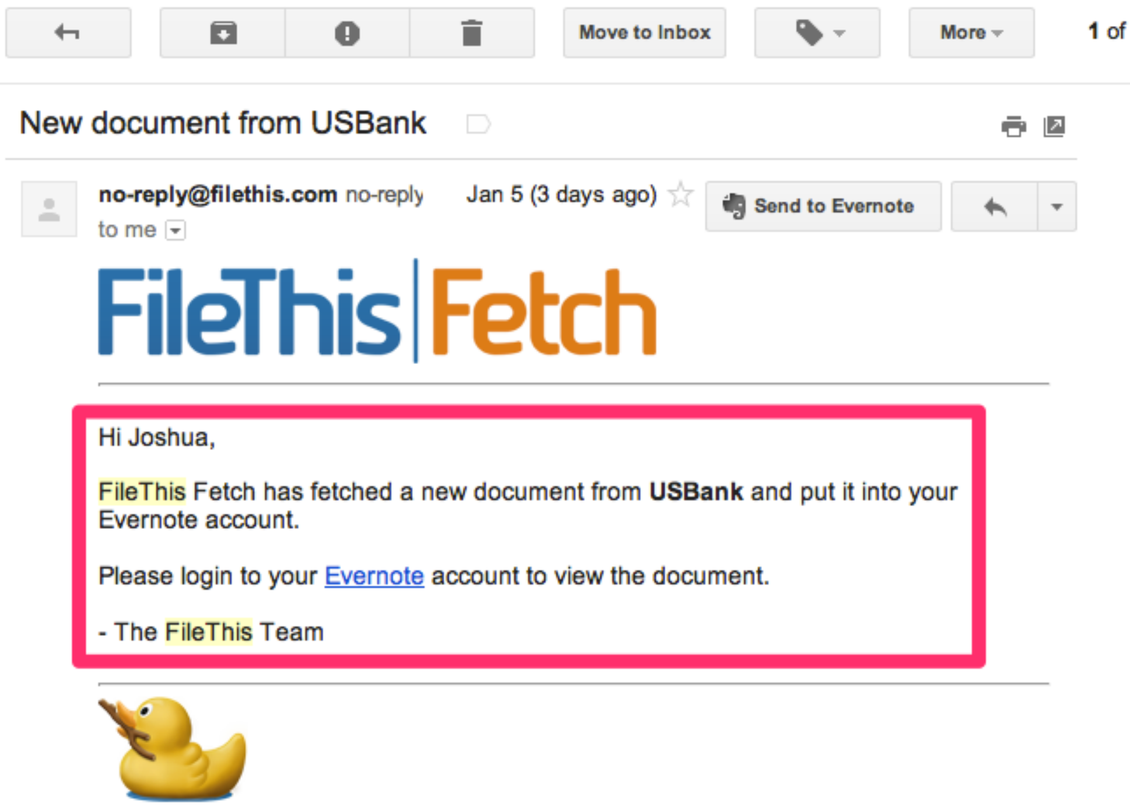
If you'd prefer a more automated method of getting your statements and bills into Evernote, FileThis Fetch can help. Essentially, FileThis Fetch is a conduit between Evernote and your banks, utilities, and vendors. In FileThis Fetch, you add each vendor as a "connection." There are currently over a hundred vendors supported by FileThis Fetch that you can connect to your Evernote account.



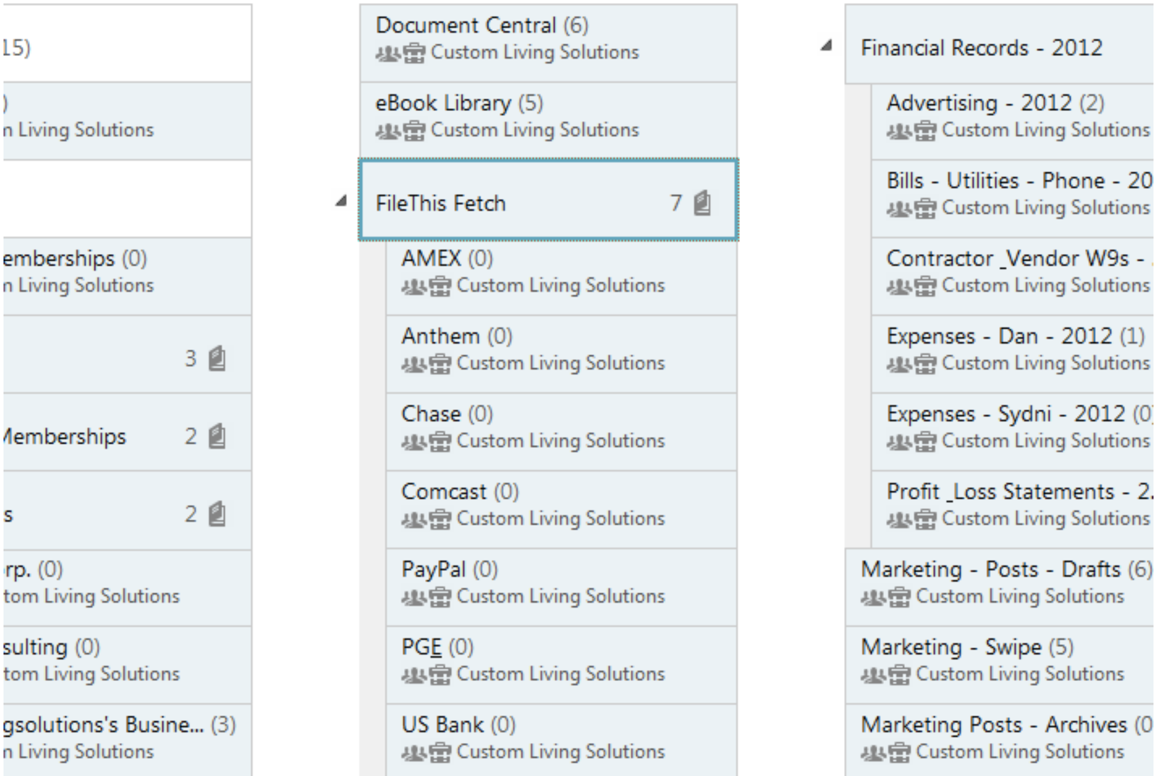
Once you give it permission for each connection, FileThis Fetch monitors each of your various accounts, and when it finds a new bill or statement it automatically downloads it to Evernote. It can also retroactively "fetch" any available past statements or bills.



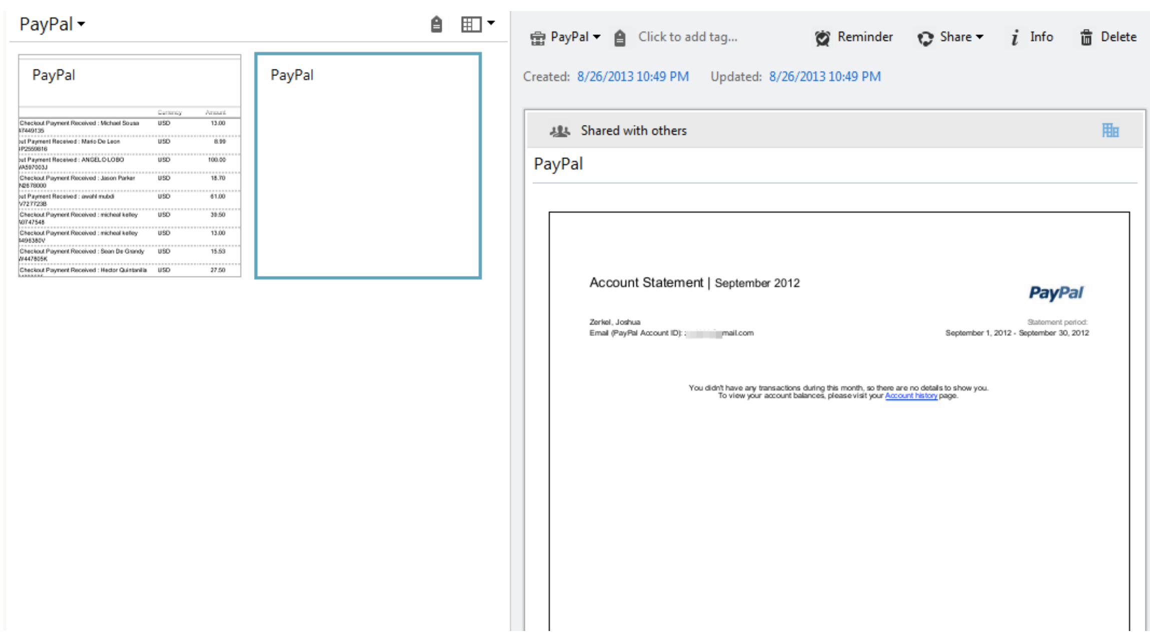
It can also send you an email every time it "fetches" a new bill or statement, keeping you in the loop.



To keep things organized, FileThis Fetch automatically creates a notebook stack called "FileThis Fetch," and within it each connection gets its own notebook.



Within each notebook, you'll see PDF versions of anything that FileThis Fetch has retrieved for you.



What's great about this is that you don't even have to log into your bank or vendor website to retrieve the statements or bills, nor do you have to scan anything in - FileThis Fetch does the work for you.

Since these documents are now stored in Evernote, you can share an individual statement or bill as needed, or share an entire notebook with a particular group or team.

Tip: Make one person responsible for the process of downloading or scanning statements, and/or for setting up FileThis Fetch. More often that not, it's easier for one person on your team to monitor and manage this process than for several people to try to keep track of who has downloaded what and how often.

The Money Thing – Action Plan

In this section, *The Money Thing,* you learned how to:

- Set up a central spot for the financial information for your business
- Keep track of every receipt and statement
- Manage company and employee expenses and automatically generate expense reports
- Centralize all bills and statements, and automatically download them into Evernote

Now it's time to take action!

What do you need to do or put into place to start using Evernote with your company's financial information?

What is the first thing that should be accomplished?

Who would be responsible for implementing that?

What tools are needed to complete the task?

What is the deadline for getting this implemented?

Who will verify that this has been completed?

Part 6

Evernote in Action

Putting Evernote to Work

Whew! If you've gone all the way through this book, then you've learned many ways to:

- Create a centralized home for all your employee and HR documents
- Find a spot for your company's polices
- Document your team's procedures as well as the step-by-step instructions on how to accomplish specific tasks
- Build your company's eBook library
- Take both digital and paper documents and create a digital file cabinet
- Send electronic documents - and get them signed
- De-clutter individual desks
- Keep track of what you and your team are working on
- Create centralized spaces for storing and collaborating on projects with your team and/or with clients
- Master your meetings with shared agendas
- Keep track of what's going on across your notebooks by using Activity Stream
- Create and use a marketing calendar to keep your team - and your marketing - on track
- Centralize, draft, and archive your social media and online marketing efforts
- Capture and store many different types of ideas and inspiration for your marketing
- Keep track of your competitors
- Standardize your communication efforts
- Set up a central spot for the financial information for your business
- Keep track of every receipt and statement
- Manage company and employee expenses and automatically generate expense reports
- Centralize all bills and statements, and automatically download them into Evernote
- …and more!

That's a lot, and you can't expect to accomplish it all at once. So how CAN you get started?

First, choose a point person at your company to spearhead the effort to get Evernote deployed in your business. Like any new tool, it will take someone to help lead and champion its implementation. This person can be responsible for setting up the Evernote account and its structure. Use the "Evernote Deployment Guide" in the Appendix as a starting point.

Next, start implementing Evernote by solving one particular challenge your company is having. For example, if your company is having challenges with meetings, perhaps start by using Evernote to create a central spot for your team meeting agendas. If your team is missing out on expense reimbursements, maybe you start by using Evernote to centralize employee expenses. Choose a real problem that your team is having, and use Evernote to help solve it. Make sure to provide enough guidance and training to get your team up to speed with how - and why - to use Evernote. Approaching your Evernote implementation from a problem-solution perspective will help prove its value to your group.

After using Evernote to solve one problem, identify another challenge that your business has, and see if you can use Evernote to implement a new solution for it. Solve one problem or challenge at a time, and before you know it, you'll have likely be using Evernote in many ways within your business.

Appendix

Please note that all of these resources are available in a shared Public Notebook at: https://www.evernote.com/pub/joshuazerkel/enaw-resources

Suggested Notebook List

Here’s a starter list of some notebooks you may want to have as part of your Evernote.

- Associations and Memberships
- Clients
- Consultants
- Education
  - eBook Library
  - Upcoming Courses
- Finance
  - Forms
  - Ideas
  - Policies
  - Procedures & How-To's
- Human Resources
  - Directory
  - Employee Manual
  - Forms
  - Ideas
  - Insurance
  - Policies
  - Procedures & How-To's
- Legal
  - Business Licenses
  - Policies
  - Who to Contact
- Marketing & Sales
  - Blog
  - Ideas
  - Scripts
  - Social Media
  - Templates
  - Procedures & How-To's
- Office Information
- Partnerships
- Projects
- Resources, Suppliers, and Vendors
- Web Hosting

Expense Categories

Here’s a starter list of some common expense categories you may want to keep track of in Evernote.

Advertising
Auto - Mileage
Books
Calendar
Computer
Consultants
Education/Seminars
Equipment (Specialized)
Furniture
Gifts
Insurance
Meals/Entertainment
Medical
Memberships
Phone - Cell
Phone - Landline
Sales Tax (Board of Equalization)
Subscriptions
Supplies
Transportation
Travel
Use Tax
Utilities – Bills
Vendors

Meeting Agenda Template

Meeting Title:
Date:
Time:
Location:
Invitees:
Attendees:

Purpose of Meeting:

Desired Outcome of Meeting:

Agenda Items

Person Responsible / Item
Person Responsible / Item
Person Responsible / Item
Person Responsible / Item
Person Responsible / Item

Meeting Notes

Action Items

Item / Person Responsible / Due Date
Item / Person Responsible / Due Date
Item / Person Responsible / Due Date
Item / Person Responsible / Due Date
Item / Person Responsible / Due Date

Evernote Deployment Plan

Set a launch date. Once you have a date for when you'd like to roll out Evernote to your group, you'll be able to create a timeline and work backwards from there.

Identify a point person to act as admin. This person will need to be able to communicate with team members that need help with using and implementing Evernote, in addition to monitoring and administering Evernote within your company.

Communicate that Evernote is coming to your team. Most people don't like change, and they typically don't like surprises - especially when it comes to tools they use to do their work. Send an email or have a brief meeting to let everyone on your team know what Evernote is, why it's being deployed in your business, and how it's intended to help everyone be more productive and organized. This is an opportunity to get everyone excited and on board!

Choose which edition of Evernote you'll need. We've explored the differences between Evernote Business, Premium, and free - decide what features are right for your business, and set up your accounts accordingly.

Set up your notebook and note structure. Decide what notebooks will be needed in your business, and create them. Plan in advance how notes are to be titled.

Create reference docs. While you're deciding on your structure, note down the structure itself as well as your note naming convention. Then you can add these to shared Business Notebooks for everyone to reference.

Share a number of content-rich Business Notebooks right away. This is a good way to get people familiarized with the different types of notes that can be created, as well as how it's helpful to have things centralized.

Install Evernote on everyone's workstations. Now that you have a structure and some sample content, it's time to get Evernote on your team's computers. Work with your IT staff if necessary to make sure everyone is on the same version and that their accounts are set up properly.

Launch with a training session. Once your team has Evernote on their computers, they need to be trained how to use it. Show them how to create notes and notebooks, and familiarize them with the structures and naming conventions you've set up. Let them try sharing notebooks and notes with other team members. If you're using Evernote Business, explore with them the differences between their personal notebooks and your company's Business Notebooks.

Expect questions. After the initial rollout, your company's Evernote admin will likely field a number of questions about how to use Evernote. Make sure everyone on your team knows who to contact, and be ready to answer questions as they come up. **TIP** - You can create a shared notebook with Evernote questions and answers in it that everyone can access!

Monitor. It's up to your company's admin to continually monitor notebooks and notes to make sure that they are adhering to your company's standards. Make any edits as needed and inform team members about changes and why they're happening.

Follow-up. About a month after launch, check back with team members (either individually, via a survey, or via a follow-up training class) to find out how the deployment is going (what's working and what isn't), and make any needed changes.

Recommended Evernote Integrations

Automation Tools
Zapier

Digital File Cabinet Solutions
Doxie
Fujitsu ScanSnap
Shoeboxed
Visioneer OneTouch

E-Signature Services
DocuSign
HelloSign
RightSignature

Financial Tools
Expensify
FileThis Fetch
Shoeboxed

Meeting Tools
LiveMinutes
UberConference

Procedures, Checklists and How-To's
Clarify
Skitch

Other Evernote-Friendly Tools
Evernote Smart Notebook by Moleskine

About the Author

Joshua Zerkel is a Certified Professional Organizer® and the founder of Custom Living Solutions (www.CustomLivingSolutions.com), which for over a decade has been San Francisco's top-rated and multi-award-winning productivity and organizing consulting firm. Josh specializes in helping large and small businesses find easy ways to get control of their information, time, and technology so they can boost their productivity – and their profits. He is the first Evernote Productivity Ambassador and is also a two-term past President of the San Francisco Bay Area Chapter of the National Association of Professional Organizers.

Josh is the co-author of the book *Integrate: Evernote*, and has been featured on National Public Radio, CBS News, ABC News, the San Francisco Chronicle and Examiner, Organize Magazine, Online Organizing, among many others, and has had his content featured by Lifehacker, Franklin Covey, Etsy, the Neat Company, and Evernote, just to name a few. Additionally, Josh consults with private clients in locations around the world both in-person and virtually.

Although he doesn't consider himself freakishly organized, Josh does admit to spending some of his free time alphabetizing his comic books.

Thank You!

Thanks for taking the time to read through *Evernote at Work*. I sincerely hope you've found some new ways to enhance your productivity with Evernote!

Please feel free to let your network know about this book by inviting them to visit www.NotesAtWork.com.

If you have a minute, I'd love your feedback on *Evernote at Work*. Drop me a line at Joshua@CustomLivingSolutions.com - I'd love to hear from you!

To your success,

Joshua Zerkel®