

Ambient Insight, LLC

Small Business on the Fourth Screen:

Choosing the Right Mobile Solution for a Small Business

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“We Put Research into Practice”

www.ambientinsight.com

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How Windows Mobile Can Help Your Small Business

Most of us who own a small business are always on the lookout for ways to run our business more effectively and efficiently. Nowadays, most of us spend time out of the office and we can't afford to be out of touch with customers or our colleagues. Waiting until the end of the day to catch up on e-mail can mean disappointing your customers, as well as missing opportunities; not to mention ruining the start of your evening.

There are probably many little things during the day that waste precious time. For instance, if you need to circle back to the office just to check e-mail to see if a document has arrived yet, or spend time searching for a Wi-Fi hotspot to connect a laptop and login just to verify the location of a meeting—that's spending time that you could use getting something else done. (Sometimes we just don't have the time it takes to boot up a laptop, login, and check e-mail.) Tick, tick, tick—wasting time, not to mention fuel. (And considering the cost of gas today, that's certainly inefficient and not trivial.)

You can put more gas in your car, but you can't put more hours in the day—believe me, I've tried—but, I have found that by carrying a Windows Mobile smartphone you can “put your office in your pocket” and take it with you. There's no doubt that because I can access my e-mail via Microsoft Outlook Mobile and use familiar Microsoft Office programs optimized for my smartphone, I can work smarter and get more done in a day. With these applications, and several others I've added to personalize my smartphone, I can stay connected and get things done when I'm on the go.

A Day in the Life

Just this afternoon I was packing up my briefcase to go to a meeting across town when my business partner Sam and I decided we needed to purchase a new noise-canceling microphone for some recording we plan to do. I didn't have time to wait until he found the model numbers of the ones he'd seen, so I asked him to e-mail the info and I'd stop at the electronics store on my way back to the office.

After my meeting, as is my usual practice, I spent a few minutes checking my e-mail in Microsoft Outlook Mobile on my Windows Mobile smartphone. I got Sam's e-mail, (replied “thanks”), forwarded one e-mail to another colleague,

scanned and deleted two e-mail newsletters, found no urgent e-mails; and then headed to the store. No need to make a separate trip the next day. And when I returned to the office, my Inbox wasn't quite so full and I used the extra time practicing with the new microphone for the next day's recording session.

Being out of the office no longer needs to mean being out of touch. You can synchronize your Outlook Calendar, Contacts, and Tasks on your desktop with your smartphone.

Meet Lucinda, a real estate agent. Just as she pulls up in front of a house she's showing, Lucinda gets a frantic call from another homeowner she agreed to represent, who needs a plumber and to reschedule the appointment they had for later that afternoon! Tick, tick, tick!

No problem. Using the familiar Outlook program on her Windows Mobile smartphone, Lucinda has access to the same Contacts and Calendar information stored in Microsoft Office Outlook on her desktop back at the office. In Contacts, she finds the plumber she's looking for and relays the information, then checks her Calendar to begin rescheduling the appointment. The grateful homeowner gives her the name of a friend who is looking for an agent, and Lucinda types his name, e-mail address, phone number, and a few notes into her Contacts on her smartphone. When Lucinda gets back to her office, she synchronizes her smartphone with her desktop computer, so her Contacts, Tasks, and Calendar stay up to date, wherever she goes.

Do More than E-mail with Microsoft Office Mobile

You can't afford workflow to come to a standstill when you step out of the office. Customers and colleagues need answers. Decisions need to be made. Sometimes just-in-time is just right.

With a Windows Mobile smartphone, you can do much more than read and respond to e-mail when you're on the move. You can extend the reach of familiar Microsoft Office desktop programs and take advantage of other applications that come with a Windows Mobile smartphone, such as Microsoft Word Mobile, Excel Mobile, or PowerPoint Mobile. Being able to review and edit documents on your smartphone helps you decrease your business response time.

The fact that you're already familiar with the Windows and Microsoft Office programs saves you time. For instance, you already recognize the Internet Explorer icon as your route to the Web, and you already know how to open, edit, and save Microsoft Office documents.

Meet Ramon, project manager of a design firm. He's on a tight schedule today: He's hurrying to a client review meeting downtown and then meeting with his new real estate agent, so there's no time to return to the office; but he needs answers today about another project in order to submit a proposal before the deadline tomorrow morning. Tick, tick, tick! No problem. Ramon carries a Windows Mobile 6 smartphone and his e-mail reaches him out of the office, just as if he were at his desk. Standing by the elevator, he checks his e-mail on his smartphone, finds the information he's been waiting for, reviews his proposal document in Office Word Mobile, makes a few changes, saves the new version, and then forwards it with his instructions to Charlie back at the

office. With a high priority Task completed, Ramon gets on the elevator and is ready to focus on his meeting.

Choose Third- Party Applications That Suit Your Business

Besides the programs that come with your Windows Mobile smartphone, there are other useful Microsoft mobile applications, as well as literally hundreds of third party applications and services, to extend the value of your investment and help you be more productive.

You'll see what I mean if you spend a few minutes browsing in the [Windows Mobile Certified Software Catalog](#). Check out the Business Productivity section and you'll find calculators, GPS, maps, time-tracking, and list managers. Third-party mobile software developers also create business productivity applications for specific industries, such as real estate, healthcare, financial services, and manufacturing.

Look for the "Designed for Windows Mobile" logo, to ensure you're getting a product that meets design standards and has been tested to work on Windows Mobile devices.



Choose the Device Type That Suits You

There is a wide range of Windows Mobile devices with many special features from which to choose. Do you need Wi-Fi or GPS capabilities? Do you want a camera or video recording? Do you prefer a small, slim, and compact model or a larger screen model with more keyboard functionality?

It's a matter of personal choice. For instance, I prefer a touch-screen style Windows Mobile smartphone with a QWERTY keyboard, because it's easier to enter data and to write extensively. One of my colleagues prefers a non-touch screen style because she has young children and finds it easier to operate one-handed. To see what suits your style, browse the [array of Windows Mobile devices](#) on the Windows Mobile Web site.

The Trend Continues

The trend is clear: more and more businesses are "going mobile." U.S. Research firm IDC reported in their 2007 study of worldwide mobile workers that compared to other regions worldwide, the U.S. workforce currently has the highest percentage (68 percent) of mobile workers. Further, by 2011, nearly 75 percent of the U.S. workforce will be mobile. According to a 2007 study of small-medium businesses (SMB) commissioned by Computing Technology Industry Association (CompTIA), 90 percent of the SMBs reported that one or more employees travel on business at least one day a week. A Cisco study released in July 2007, notes that self-employed workers are twice as likely to be mobile than paid workers (45 percent v. 26 percent).

What about your business? Are you ready to put your office in your pocket?

Take Your eMail Mobile with Windows Mobile

It's actually hard for me to remember what it was like running a business without e-mail. E-mail is as relevant to your business today as letters written by hand were a century ago. I can't say I remember anything that long ago, but I do know that customers didn't have the same expectations as today. Today, if a question from a customer sits in your e-mail Inbox for four hours or so, they're likely to think you're out playing golf or you just don't care about their business.

And if you are out of the office on a sunny afternoon—maybe you *are* playing golf—you can keep the wheels of commerce rolling by carrying a Windows Mobile smartphone, so you can receive and respond to e-mails on the go. Without one, you are more likely to be out of sync with business associates, miss important changes of a meeting place or time, or find it difficult to get data when you need it to do your job.

Life moves in real time

Changes happen in real time and if you can't keep up, you're liable to be left behind. Many small business owners and employees spend a significant part of their day out of the office. Imagine these situations:

- The manager of a sports medicine clinic needs to alert one of the physical therapists that an afternoon in-home appointment was canceled.
- A specialty book distributor needs to receive the updated price list and the purchase order history of a customer before making a sales call.
- A real estate agent views a house that seems perfect for a certain prospective homebuyer and needs to get the listing information and a picture to her fast.

All these stories could have a happy ending—time saved, successful sales call, satisfied customer—if the sports medicine manager, book distributor, and real estate agent carried a Windows Mobile device and had access to their e-mail while they were out of the office.

The familiar look of Outlook

Windows Mobile offers familiar features, including several choices of how to let your e-mail keep up with you in real time, that make it easy to use. Making the leap from the desktop version of Microsoft Office Outlook to Microsoft Office Outlook Mobile on your Windows Mobile smartphone isn't really a big jump at all. You can use many of the familiar e-mail messaging features such as viewing and sending e-mails in HTML formatting with bold, text color, and underlining to make your points and keep up your professional appearance.

I also like having the familiar folder structure; I can check the Sent folder to see when an e-mail went out and go to the Deleted folder to retrieve an e-mail that I previously deleted. It's also helpful to be able to set up messaging flags or reminders, just as you can with Outlook on your desktop computer. Another Windows Mobile feature that makes it easy to keep connected to your

e-mail accounts and your personal information up to date is constant synchronization of Outlook, Calendar, Contacts, and Tasks.*

One of the capabilities of Outlook Mobile I value very highly is the ability to download and save e-mail attachments such as Word files and photos to my Windows Mobile device. I routinely review and even edit documents, and using Outlook Mobile send a response back to someone right away with no loss of formatting or images. Whether you choose a non-touch screen device (Windows Mobile Standard) or a touch screen device (Windows Mobile Professional) will determine how fancy you can get with the formatting.

My company recently upgraded our smartphones and there was no question that for me it was going to be a touch screen model. Since I do a lot of writing, I like to be able to use the enhanced editing features in Word Mobile that are available on the Professional (touch screen) version.

Setting up e-mail on my Windows Mobile 6 smartphone was even easier than before. Best advice is to follow guidance from your mobile operator and review the step-by-step e-mail setup instructions on the [Windows Mobile Web site](#).

E-mail choices

You have three good choices for getting your Outlook Mobile e-mail on a Windows Mobile device. Which one you choose depends on your business and personal needs. Let's look at these choices through the eyes of the three businesses I mentioned earlier:

- **Webmail and ISP e-mail** – The sports medicine clinic uses e-mail mostly among members of the staff and can get along fine with the simplicity of e-mail accounts provided by their Internet Service Provider (ISP) or a Webmail service such as AOL, Gmail, Yahoo!, Windows Live Hotmail, or Microsoft Office Live Small Business. The price is right: Outlook Mobile is free (comes with Windows Mobile smartphones) and there are no maintenance or support costs.
- **Hosted Exchange** – The specialty book distributor does business across the country and timely messaging is the backbone of its business. Coordination for trade shows and sales calls is important, so the distributor needs the added messaging functions a Microsoft Exchange Server can provide—like shared calendars; managed security; and Direct Push to keep e-mail, Calendar, Tasks, and Contacts up-to-date automatically—but it doesn't have the personnel to administer it. For the book distributor, Hosted Exchange is the best of both worlds: The company can get the features it needs without an up-front investment and its hosting partner manages the server on a subscription basis.
- **Microsoft Small Business Server (SBS)** – The real estate company needs a Small Business Server (SBS) to give it the robust business functionality it needs, such as file and printer sharing; data backup capabilities; and all the features of the Exchange messaging system, which integrates with Outlook Mobile. With Exchange, employees can get the constant over-the-air synchronization of Direct Push and the convenience of a company-wide directory on their smartphones. The

company has staff with the skill sets to maintain its own server and managers can gain more control of their business with the ability to have one of their own staff members manage security by remotely wiping a device reported lost or stolen.

Whichever e-mail choice you make, Windows Mobile with Outlook Mobile will help you and your colleagues stay connected to the things that matter.

Getting Web-based and ISP eMail on Your Windows Mobile Phone

How do you use e-mail in your small business? Do you get e-mails from potential customers asking about your rates or services? Do you respond to requests from current customers in e-mail? Do you use e-mail to communicate with your team and to keep tasks moving forward and schedules aligned? Do you get e-mail from family or friends that deserve a quick response? Some things cannot wait until the end of the day or for you to get back to your desk. If you carry a Windows Mobile phone, you can do all these things wherever you have a wireless connection. And if you have more than one e-mail account, you can use your Windows Mobile phone to access up to seven of them.

Many small businesses find that the simplest and most affordable option for keeping connected to e-mail on the go is to access their Web-based or Internet Service Provider (ISP) e-mail accounts on a Windows Mobile phone. Whether you have an e-mail account with Windows Live Hotmail, Gmail, Yahoo!, Microsoft Office Live for Small Business, or any other company that provides Internet service, you can respond to customers' requests quickly, ask (or answer) time-critical questions, and confirm arrangements and orders over e-mail—all from your phone.

Meet Alex, owner-operator of a home heating company. Alex has four employees, each of whom he has supplied with a Windows Mobile phone. Because the expertise in Alex's company is more about heating systems than computer systems, Alex's choice for e-mail is through his ISP. Everyone in the company has an e-mail account with this ISP that they can access on their phones.

If schedules need to change during the day, Alex can quickly get in touch with his technicians in the field through e-mail to confirm addresses or appointment changes, and he can reach all of his employees with one communication. In turn, Alex's employees can stay connected to the office during the day. For example, with their Windows Mobile phones, Alex's employees can submit a request by e-mail to order specialty parts before they leave the job site. Because the technician e-mails the request, it eliminates the chance of someone mishearing a voice message and ordering the wrong part. Not having to wait until the end of the day also means reducing the time it takes to complete a job and improving customer satisfaction.

Setting up e-mail

You can set up your Web-based or ISP e-mail accounts right on your phone. There is an Auto Setup "wizard" right on the phone that walks you through

the steps. On a Windows Mobile 6 phone, go to Start, tap Messaging, then tap New E-Mail Account to get started with the Auto Setup process. Auto Setup can check automatically for your server settings and makes the process easy. A new feature of Windows Mobile 6.1 makes easier still to auto-configure your custom e-mail accounts. You can refer to the [instructions for setting up e-mail on the Windows Mobile Web site](#) for details of what you need. I have also found that mobile operators are happy to help if you find you need assistance.

If I wanted to change my e-mail settings—and I have from time to time, particularly when I want to adjust the size of messages I receive on my phone—I can do so with just a few taps on the Menu in Outlook Mobile on my phone.

Using Outlook Mobile

Outlook Mobile comes free with Windows Mobile phones. If you already use Microsoft Office Outlook on your desktop, you'll find that it's an easy transition to use Outlook Mobile on your Windows Mobile phone. After all, you're already familiar with the look and feel of the folders such as Inbox, Drafts, Sent Items, and Deleted Items.

Outlook Mobile is, of course, compatible with the various Microsoft Office suites. So you can download, save, view, and send Microsoft Office Word, Excel, and PowerPoint documents on your Windows Mobile phone.

For those times when you are not connected, you can also read the e-mails you have already downloaded. You can also create e-mails offline in Outlook Mobile and send them the next time you are connected.

Synchronizing

One of the features I particularly value about Windows Mobile is the capability to synchronize my Outlook e-mail, Calendar, Contacts, and Tasks between my desktop computer and my phone. With ISP or Web-based e-mail, you have two choices for how to download e-mail onto a Windows Mobile 6 phone.

1. You can simply configure the Outlook Mobile e-mail settings to connect to your ISP and schedule the time interval for receiving e-mail automatically on your phone. This way, you don't have to go looking for your e-mail—it comes to you.
2. You can choose to synchronize your Outlook e-mail as well as your Calendar, Contacts, and Tasks from your desktop computer to your Windows Mobile phone using a USB connection.

Let's look at how someone like Alex might use this feature.

Say that while Alex is in the office, he gets a call from a new customer. He enters the contact information into his desktop Outlook Contacts and schedules an appointment in his Outlook Calendar. When he synchronizes his desktop computer with his phone, the contacts and calendar information are transferred, so he has the information he needs wherever he goes.

Synchronizing saves time in two ways. First, Alex only has to enter the information once. Second, if he were out of the office and needed to contact a customer, he wouldn't have to return to the office because he would have their contact information with him on his phone. The Windows Mobile Web site has [step-by-step instructions on how to synchronize your Windows Mobile phone](#) with your desktop computer.

Rich integration and tight synchronization

You can have an even richer e-mail experience on your Windows Mobile phone with a [Windows Live Hotmail](#) account or an Office Live Small Business account. Not only can you wirelessly synchronize your e-mail when you choose; your e-mail is also synchronized to your Window Mobile phone in real time whenever you have mail. No waiting; your Inbox is always up to date. With an Office Live for Small Business account, your company can have its own domain, which projects a more professional image. Your company-branded domain can end with .com, .net, .org, or .info, and can support up to 100 e-mail accounts.

If you have Windows Live and Office Live e-mail accounts on your Windows Mobile phone, you just need to log on to each account separately in order to receive your e-mail.

Getting e-mail on the go

How many e-mails do you get in a day—10, 20, 30, 50, more? You can simplify your life by extending the reach of your e-mails to a Windows Mobile phone and using its capabilities to control the flow of the information. Staying connected means you can get more things done, and less stress for you and your customers. It also means having more time to spend on things in life that matter to you.

As a small business owner, I've found that on the days when I need to be out of the office on one project, it's reassuring to keep connected to my other projects and family via e-mail. As a result, there are no surprises when I get back to the office, and I've stayed connected to those who matter most during the day.

It doesn't take much time at all to get used to using e-mail on your Windows Mobile phone from the Gmail, Yahoo!, Hotmail, or most other types of e-mail accounts you are already using on your PC. Your flow of e-mail doesn't need to stop when you step out of the office. Because the setup is intuitive—there's a wizard right on your phone to take you through the process—and the look and feel of Outlook Mobile is familiar, you'll find it easy to get started. Before long, I'll bet you'll wonder how you got along without it.

If you want to maximize the benefits of e-mail on a Windows Mobile phone—such as the ability to view e-mails in HTML format to preserve spacing, pictures, charts, tables, and hyperlinks as in the original documents and over-the-air synchronization of Outlook Calendar, Tasks, e-mail, and Contacts—you might consider the value to your business of moving your company e-mail to a Microsoft Exchange Server solution.

Mobile Messaging Options with Microsoft Exchange Server

At the Mobile World Congress 2008 in Barcelona, Spain, the judges gave the award for "Best Mobile Enterprise Product or Service" to Windows Mobile 6. What is of interest to business owners are the judges' comments: "A leading platform for business owing to the ease of integration with Microsoft Exchange infrastructure. For the SMB market in particular, Windows Mobile 6 is an attractive proposition."

How does your company get e-mail now? Does your e-mail give your company the service (and give your customers the perception) you want to meet your strategic objectives? Can you share calendars and set up "Out of Office" automated replies?

To take full advantage of the benefits of business class e-mail on a Windows Mobile phone, it may be time for you to consider the value of moving to a mobile messaging solution based on Microsoft Exchange Server. A Microsoft Exchange Server mobile messaging solution is not just for big business.

Small business options

Companies have three options for moving to Exchange mobile messaging.

- **Microsoft Hosted Exchange** provides you with all the operational benefits of a business class messaging system, but none of the responsibility for running it, since you partner with a Hosted Exchange provider who manages administration on a "pay as you go" subscription basis.
- **Windows Small Business Server (SBS)** is a bundle of Microsoft technologies including Windows Server, SharePoint Portal Server, and Exchange Server. SBS is designed to meet the networking and messaging needs of small to medium-sized companies including file and printer sharing, security management, access to data when away from the office, and a full-featured Exchange Server messaging system that extends to Windows Mobile phones.
- **On-premises Exchange Server** is a stand-alone single or distributed server solution that delivers a complete messaging solution, including mobile messaging.

As Alberto Martinez, marketing manager for Windows Mobile said, "With any of the applicable solutions, the 'what' is the same; it's the 'how' that is different." We'll look at the Exchange mobile messaging options from the 'why' point of view of three different businesses: a small insurance company, a medical practice, and a law firm. These three businesses want to provide their employees with a mobile messaging solution that enables them to get things done and stay connected throughout the day.

The similarities

All three options are based on Exchange messaging combined with Microsoft Office Outlook Mobile (free with Windows Mobile smartphones). Some of the capabilities include:

- **Continuous (“Direct Push”) synchronization** between Outlook Mobile (on Windows Mobile phones) and Microsoft Exchange Server of your e-mail, Contacts, Calendar, and Tasks—with rich formatting retained.
- **Access to e-mail when offline** so you have access to downloaded information whether or not you have a wireless connection (for example, when you’re on an airplane).
- **Ability to view, save, and send attachments** so you can work with documents and pictures on your phone at your convenience.
- **Access to company directory via Global Address List (GAL)** so you can find contact information for anyone in your company, wherever you are.
- **Ability to set, clear, or complete flags** that serve as reminders on outgoing or incoming e-mail, just as on the desktop.
- **Enterprise messaging features** that give you a rich messaging experience with the ability to set up out-of-office automated replies; fully search all Exchange folders; remotely wipe storage cards; and use rich formatting of HTML e-mail, which preserves pictures, charts, tables, and hyperlinks.

The differences

One size does not fit all when it comes to choosing a mobile messaging solution. The chart below highlights key differences between the Exchange mobile messaging solutions.

Features and requirements	Hosted Exchange	SBS	On-premises Exchange
Monthly subscription “pay as you go” fees	Yes	No	No
Up-front investment in server software and training	No	Yes	Yes
Requires at least one in-house staff member to deploy, manage, and support server software	No	Yes	Yes
Ability to scale cost of the service up or down quickly as needed	Yes	No	No
Data back-up capabilities	Yes	Yes	Yes
Printer networking	Yes	Yes	Yes

Imagine three business decision makers who want the same full-messaging capabilities, but have different business needs.

Meet Robert, owner of a small insurance company, who needs his insurance agents and claims adjusters to respond quickly to customers. Adjusters in particular spend most of their time in the field, and need to be able to receive or access “facts of loss” reports e-mailed by the claims broker. The company does not have a person on staff with IT expertise and has other priorities for capital investments, and so Robert prefers subscription pricing model and the flexibility of a Hosted Exchange solution. Hosted Exchange is the perfect solution for Robert’s company.

Meet Mai Ling, co-owner of a medical practice that must comply with medical records requirements and serve patients in the office and in hospital. The medical practice already has an IT specialist on board and needs to pay strict attention to complying with patient privacy regulations. Mai Ling sees the cost of a Small Business Server as a capital investment that keeps her company in direct control of information and messaging via Exchange Server. The data protection provided by the robust firewall of Windows Server and the internal document and information sharing capabilities of SharePoint Portal Server are also valuable services for Mai Ling and her partners to invest in. Small Business Server makes the most sense for Mai Ling’s practice.

Meet Eduardo, founder of a law firm that requires its attorneys to respond quickly to clients, whether the attorneys are in or out of the office. The firm, which uses Windows Mobile phones, has an internal IT group who maintains an extensive knowledge management system and has responsibility for managing the company’s messaging system. Eduardo views the Exchange mobile messaging system as a critical extension of an important business tool for attorneys and staff.

Mobile Productivity and Line-of-Business Applications

One of the main advantages in having a Windows Mobile phone is the rich array of productivity applications that are available to help you get more done and stay organized wherever business takes you. More and more, people have jobs that take them out of the office, and you are probably part of this trend. According to the Yankee Group’s report, “Anywhere Enterprise—SMB: 2007 European Fixed-Mobile Convergence Survey,” 42% percent of the small and medium-sized business workforce spends more than 20% of their time away from their desk. Imagine how you could turn downtime into productive time by having access to a host of mobile applications tailored to your business and life.

I’m sure you can think of several tasks or activities that you’d like to be able to do without waiting to return to home base—in addition to getting e-mail on the go. Need to track your time for billing just after you get off a call? Want to track your expenditures for your expense report the moment you get the receipt? Need quick directions to your next appointment? Want to find the closest coffee shop or the best price on fuel? What if you had access to real-time stock prices to make decisions? Or access to medical or legal references at your fingertips? Imagine doing all of this while only having to carry just one device.

Given the widespread availability of broadband networks plus phones and devices that are increasingly capable of running sophisticated applications, there are more and more opportunities for business people to extend the reach of their personal and business productivity with general and industry-specific applications. In this article, we'll explore three basic types of mobile productivity applications that you should consider taking with you:

- Microsoft Office Mobile
- Line-of-business and cross-industry applications, and
- Personal productivity choices such as Windows Live and Live Search.

Your Office in Your Pocket

Personally, I can't imagine leaving my office without my "Office"—my Microsoft Office Mobile applications, that is. On any given day, I might be adding data to a spreadsheet in Microsoft Office Excel Mobile, writing or editing a Word Mobile document, or reviewing a presentation in PowerPoint Mobile. I usually store files on my phone so I can bring them with me or I receive them in e-mail—in either case, the formatting remains intact on my phone.

The functionality differs slightly depending on whether you're using a touch-screen or a non-touch screen phone, but the familiarity of the Microsoft Office interface makes it easy for you to adapt to Office Mobile.

- **Excel Mobile** – Whether you use Excel for spreadsheets for "number crunching" or as a handy tool for data management, you can take your data with you and input more data throughout your day.
- **PowerPoint Mobile** – Being able to take your presentation with you on your Windows Mobile phone means you can practice it without taking the time to boot up your laptop.
- **Word Mobile** – Word Mobile is useful to review and edit documents, or just jot down quick notes. On a Windows Mobile 6 Professional phone, the toolbar shows the familiar formatting options such as bold, italic, bullet points, and margins.

Depending on when you purchased your Windows Mobile phone, you may need to obtain the free [Microsoft Mobile Office Upgrade](#) to view and edit 2007 Microsoft Office files on your phone or device.

Line-of-Business Needs

Depending on your line of business, you can find specialty applications that will make it easier for you to be more responsive to customers and access pertinent information at the point of need. Here are some examples of how different professionals rely on their Windows Mobile phones and certified software to do their jobs.

Healthcare

To deliver quality care, health practitioners (doctors, nurses, paramedics, and medical students) need immediate access to accurate, up-to-date healthcare knowledge resources, including diseases, diagnoses, and drug interactions. They can use that same phone or device to capture their dictations. Some examples include:

- [Opus](#) (Boston Bar System) – Dr. Woods uses dictation software on a Windows Mobile phone. The software is designed specifically for healthcare professionals; the encryption feature addresses the need to maintain compliance with the Health Information Patient Accessibility Act (HIPAA).
- [Oxford Concise Medical Dictionary](#) – Dr. Woods also keeps healthcare reference software on her Windows Mobile phone so she can look up medical terms on her phone or device without needing to go back to a computer.
- [Find certified software for healthcare](#)

Legal/Professional services

Consultants and attorneys need to respond rapidly to client needs and to be able to efficiently and accurately track time spent on each client. Further, law professionals need quick access to legal precedents and other resource materials when they are out of the office. Not only can a Windows Mobile phone help you be more productive, you can also capture billable time during what would otherwise be downtime.

- [Time Logger](#) (AcroDesign Technologies) Phyllis is an attorney who needs to track client hours for multiple projects while she's in or out of the office.
- [Find certified software for legal](#)
- [Find certified software for accounting](#)

Real estate

Real estate agents and mortgage brokers spend their time in the field prospecting, listing, and selling properties. Real estate professionals need to access and compare listings in real-time and manage lock boxes from their mobile phones, rather than waste time going back to the office. Check out these examples:

- [Mortgage Pad](#) (Visual Byte, Inc.) – As a mortgage broker, Shawn depends on a mortgage calculator to assess monthly payments and amortizations, and run scenario comparisons quickly for multiple clients wherever business takes him.
- [Borran Pocket Real Estate™](#) - Michelle relies on her Windows Mobile camera phone and on having real-time access to MLS info so she can download thousands of property listings onto her Windows Mobile device and compare statistics for her customers.
- [Wayfinder Navigator™](#) - Location. Location. Location. Although William's current phone is not equipped with GPS, he can get GPS software packaged with a GPS receiver not only to look up directions, but also to show clients nearby schools, libraries, banks, and restaurants.
- [Find certified software for real estate](#)

Financial services

Stockbrokers, traders, financial advisors, and insurance professionals need timely access to financial data, economic event alerts, client data, as well as to be able to do business when not at their desk on any given day.

- [Quotestream Wireless™](#) - Takashi stays on top of the market with a stock market application that provides quotes, market indices, foreign exchange rates, historical and intraday charts, news, wireless trading, and stock alerts on his Windows Mobile phone.

- [Find certified software for financial services](#)

Cross-Industry Applications

Some Windows Mobile applications are relevant to many different types of businesses. For example, sales people use their Windows Mobile phones to view inventory information in real-time, provide a quote, and create customer orders or invoices on the spot. Field force employees may need to access manufacturer's information or escalate a support issue while they are out on a call. Most mobile professionals need to track their time, mileage, and expenses.

- [Pocket Verifier Professional](#) (Advanced Merchant Solutions) - Elena uses her Windows Mobile PDA to accept, authorize, print, and store transactions right at the point of sale.
- [Keep Track for Smartphone](#) (Illium Software) – While Lee is on the road making sales calls, he tracks and categorizes his debit card, credit card, and cash spending.
- [Odometer Recorder](#) (Kolya Mobile Computing) – Renaldo works for a plumbing company and needs to track mileage for each customer call.

Personal Productivity – Windows Live

I've found several of the Windows Live services very useful for keeping connected to people that matter to me and finding information quickly with my Windows Mobile phone. If you have a data plan, you can take advantage of the array of Windows Live services available over the Internet. The list of services includes Windows Live Spaces, MSN Mobile, SMS Services, Live Search, Local Search, Windows Live Messenger, and Windows Live Hotmail. Read a summary of the [Windows Live services](#) or point your mobile browser to <http://m.live.com>.

Of course, most mobile professionals at some point need directions. Perhaps it's the location of a meeting with a client, or a good place across town for Thai food, or directions to the nearest gas station. Now, it's true that not everyone wants to stop and ask for directions, and that's where a Windows Mobile phone and Live Search and Local Search really come in handy. Before you drive—and possibly lose time by losing your way—you can get listings of businesses, detailed maps with zoom features, and turn-by-turn directions to take you door to door.

- [Windows Live for mobile](#) – read an account of using Live Search and Local Search while traveling and locating a hotel in the next small town.
- [Using Bluetooth GPS with Live Search for Windows Mobile](#) – read more about using Live Search for Windows Mobile with GPS.

What Do You Look for in an Application?

If you're at all like me, you want applications that are easy to purchase and easy to install, either over the air onto the phone or to download to a computer and then transfer to the phone or device. If your business is large enough to have an IT specialist, then you would want to be sure applications are easy to deploy without spending time on back-end integration. What we all want are applications that are easy to use without major customization.

Before I buy, I always check out the support options: Do they offer call center support, online chats, conversations with automated natural language agents,

e-mail support, an active community forum, or just Knowledge Base articles? If they offer e-mail support, do they publish a service level agreement (SLA) that spells out their response time-frame?

Where to Find Applications

There are plenty of off-the-shelf applications available to suit your line-of-business or productivity needs. The smart place to start looking is in the [Windows Mobile Certified Software Catalog](#), where you'll find mobile software that has been tested to meet the quality standards of the "Designed for Windows Mobile" logo program.



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