

On the Road with My Subnotebook



by Jay Cross,
July/August 1995

Jay Cross is vice president of Omega Performance, an international bank training firm based in San Francisco. Omega trains bankers to sell.

Last month I joined three dozen senior bankers for a two-day symposium in Washington on consumer retail investment products. The best and the brightest were giving their views on new products, organizational strategies and the shape of the marketplace. House Banking Committee chairman Jim Leach gave his timetable for regulatory reform. Ideas flowed back and forth at a furious pace, and I didn't want to miss anything. I also wanted to review what took place at my leisure rather than try to process all the information at once. And I wanted to capture some of what I was hearing to share with my colleagues and clients after the session. In addition, I wanted to know how to follow up with some of the speakers at a later time.

The solution was in my subnotebook computer. It's an unobtrusive little

only computer in the room.

Think of the ways that your customers might respond if you were taking notes on a small computer at a sales call or meeting. Some might be very impressed — especially baby boomers who have a computer at home for their young children. If a customer seems intimidated by the technology, explain how efficient a laptop is for taking notes and recording conversations and how these notes and records can help you meet their needs.

If you do take a laptop, be prepared to answer questions. At an evening reception and during breaks, I was pummeled with questions. Some asked, "What is that machine?" Others wanted to know, "What do you do with it?" And several told me, "I've been thinking of getting one of those. What kind do you recommend?"

A laptop can be a valuable tool for note taking at meetings, finding ways to keep in touch with customers and looking up information on sales calls. Here are my answers to the questions that your customers may ask if you decide to take a laptop with you.

"WHAT KIND OF COMPUTER IS THAT?"

In my case, I carry a Handbook from Gateway 2000. It's an IBM-compatible Windows machine. I chose the Handbook because it's lightweight (less than 3 pounds), compact (9.75" x 5.9" x 1.6"), and cheap (\$999).

But its size and price don't make it a weakling. There is the old analogy of making cars and making computers. If automotive technology had advanced at the pace of computer technology, you'd be able to buy a Rolls Royce that goes 250 mph for a dime.

My little subnotebook computer contains an Intel 4X6 processor and a 250 MB hard drive. It runs Windows for Workgroups, Microsoft Word, Excel, PowerPoint, Access, Visio, InfoSelect, Delrina Planner, WinFax, Netscape,

I use the Handbook as a word processor, to churn out letters, memos, reports, and, right now, this article. But I find myself using the Handbook for a lot more. I keep notes of meetings and maintain project histories. When I come upon a fresh idea or exciting quotation, I put it into a text database so I can recall it in the future. Every day I record my progress into my business journal too.

I no longer carry a calendar. My calendar is on the computer, as is my address book and phone list. It also contains other reference information: to-do lists, tickler files and reminders, lists of references, medical information, product descriptions and a book I'm reading. A simple program transfers the latest version of this core information from the Handbook to my office computer (a Mac) or my home computer (a Gateway PC).

It's humbling to realize that everything you're working on fits on a 3.5" disk.

When I bought the Handbook, I spent an additional \$149 for a PCMCIA mode. (PCMCIA is computerspeak for "about the size of a credit card.") The modem pops into a slot on the side of the computer and lets me connect to telephone lines. This in turn enables me to tap into my firm's electronic mail system from a hotel room or Red Carpet Room and receive faxes. Lately, I've been using the modem to access the Internet's World Wide Web and a lively computer conferencing system called "The WELL."

My hard drive also contains software that lets me create and work with spreadsheets, graphics, presentations and databases, but I spend less time with these than with the other functions.

WHAT Do You RECOMMEND?

There are many great notebook computers on the market but the right machine for you depends on your needs.

You probably don't want what I've got. I'm happy to put up with a tiny

Were I looking for the best battery life (San Francisco to New York on one battery), I would buy a Dell. For a full-size keyboard, I'd choose the new IBM ThinkPad "Butterfly." For power-user options with good fit-and-finish and reliability, I would select a Toshiba. No matter what I bought, I would first check *PC Magazine's* ratings for reliability, service and suitability to task.

So WHAT?

The summer '95 issue of *Inc. Technology* magazine reports that 96% of respondents answered "yes" to the question "Has technology made you more effective?" Only 3% responded "no, about the same"; and a mere 1% answered a plain "no."

Maybe you're satisfied with your current level of effectiveness. Or maybe you're the one in 25 who wouldn't realize a net gain. There's another reason to lay your hands on a portable computer—an even more compelling reason to embrace this technology.

If you don't have hands-on familiarity with what small computers can do, you're not going to understand what's going on in today's business world. You'll fail to see your options. You'll miss the chance to leverage your organization's and your personal strengths.

If you're not computer literate— and I mean making-it-work-for-you-personally literate—expect the information age to pass you by. Your people are using computers to provide better service, to improve your competitive position, to save time, to improve their skills, to express themselves. And maybe more importantly, your competitors are using computers to accomplish these very things.

Some specialists may be able to make it to retirement without gaining an appreciation of new technology. But in most cases, if you don't understand technology directly, you're not going to be able to figure out how best to use it to serve your customers and create competitive advantage.

control of the vast amount of customer information that crosses their desks everyday. Quick notes could easily be made after each call to remind the rep how to follow up. Reps who travel from branch to branch can keep notes on a computer instead of relying on file boxes located in the trunks of their cars. More importantly, the pressure is on for reps to begin "working their book of business" since referrals from branch staff is a dwindling source of business. Keeping notes on good customers is the only way to know how to work your book in the future. Two or three good "trade" tickets or sales to customers easily pay for a rep's investment in a computer like the one I carry.

The securities business is a sophisticated business and unless bank reps arm themselves with the technology to keep up with it, their business will pass them by. In his book *The Media Lab*, Stewart Brand uses the analogy of a steamroller to describe the way new technologies are rolling through — you are either driving the steamroller or you are part of the road.

UPDATE, June '98

For about a year I've been carrying an IBM ThinkPad 560, the one without the internal CD drive. It weighs about the same as the Handbook but the screen is twice as large and in color. The keyboard's less cramped. And the batteries last a bit longer. Cost me \$2,000 a year ago. It's under \$1,500 now.

