



Managing Your Small Business with SureTrak

presented by

**Deborah Lazicki
S&R Associates, Inc.**



Introduction

- ◆ How can a successful entrepreneur manage a myriad of administrative requirements?
 - “Projectize” the work
 - Apply project management skills
 - Use SureTrak!





Overview

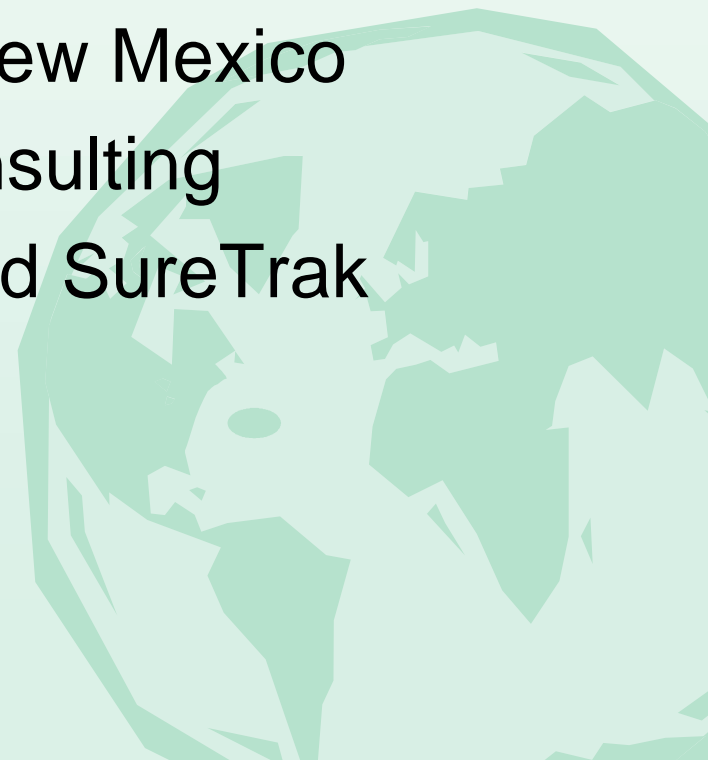
- ◆ Business case
 - Goals and objectives
 - Priorities and challenges
 - Projects
 - System requirements
- ◆ SureTrak demonstration
 - Project management system
 - Tips and tricks





S&R Associates, Inc.

- ◆ Woman-owned, small business
- ◆ Established in 1994
- ◆ Offices in Georgia and New Mexico
- ◆ Project management consulting
- ◆ Authorized Primavera and SureTrak trainer





Goals and Objectives

- ◆ Corporate
 - Growth
 - Short term (shed tasks)
 - Long term (hire staff)
 - Succession
- ◆ Employee
 - Communication
 - Training





Priorities and Challenges

◆ Priorities

- Client satisfaction
- Employee development
- Legal and financial requirements

◆ Challenges

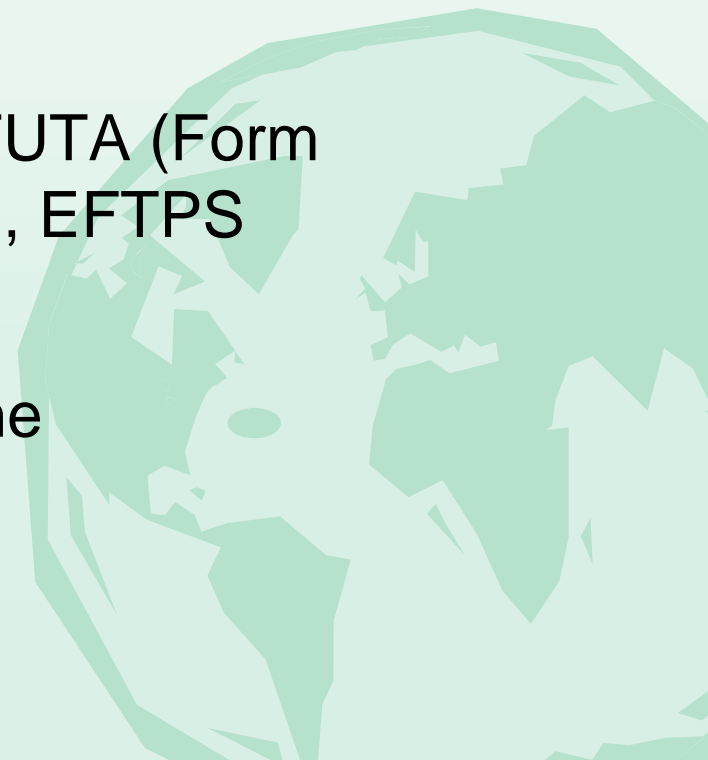
- Meeting schedules and deliverables
- Juggling limited resources
- Communicating across distributed project teams





“Projectizing” the Work

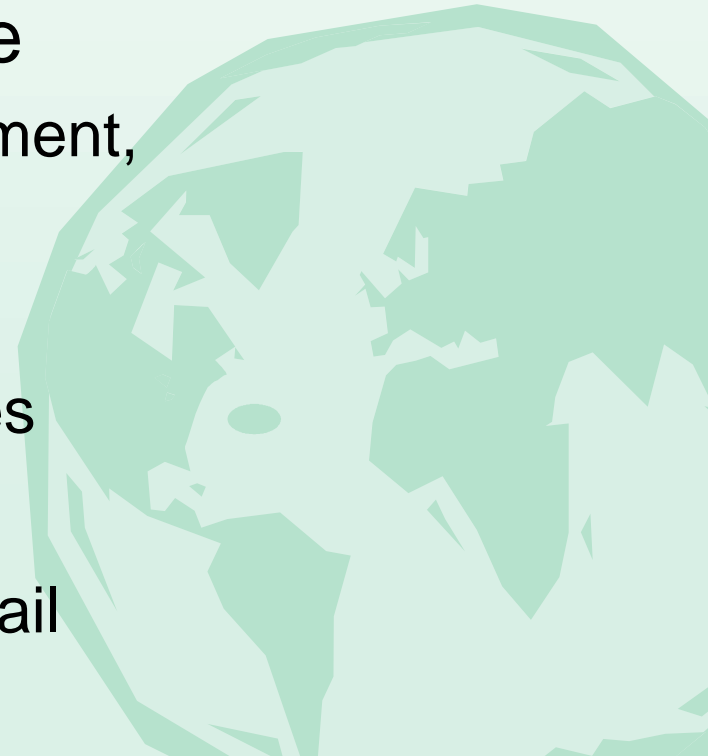
- ◆ Small-business considerations
 - Certifications, registrations
- ◆ Federal reporting
 - Withholding (Form 941), FUTA (Form 940), Income (Form 1120), EFTPS
- ◆ State reporting
 - Withholding, SUTA, income
- ◆ Local reporting
 - Property, sales/receipts





“Projectizing” the Work *(cont.)*

- ◆ Employee induction
 - Form W-4, Form I-9, new-hire report
- ◆ Office setup/maintenance
 - Space, furnishings, equipment, utilities, license
- ◆ Human resources
 - Employee benefits, policies
- ◆ Information technology
 - Web site, computers, E-mail





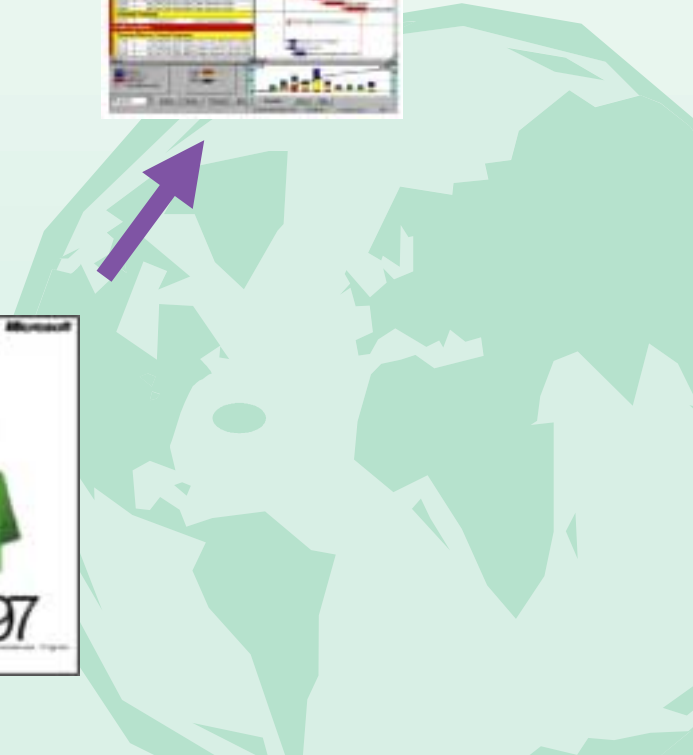
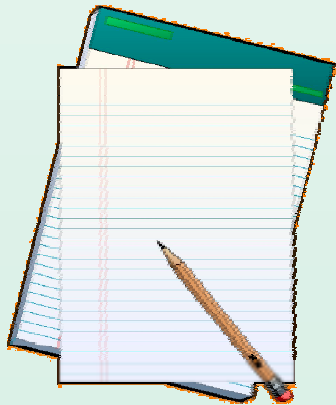
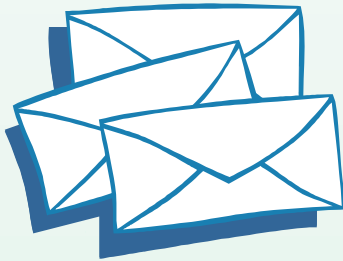
“Projectizing” the Work *(cont.)*

- ◆ New business opportunities
 - Proposals, presentations
- ◆ Existing projects
 - Startup, consulting, oversight
- ◆ Professional development
 - Training, conferences, associations
- ◆ Marketing and promotion





Evolution of Our System





Minimum Requirements

- ◆ Project modeling
 - Planning and scheduling
 - Resource and cost management
- ◆ Multi-user capability
- ◆ Communications
 - Reports and graphics
 - Mail
 - Internet





The SureTrak Difference

- ◆ Ease of use
 - Data exchange with MS Office (Excel)
 - Model many independent projects and/or activities (Constraints)
 - Minimize updating time (Progress Spotlight)
 - Integrate with documents (hyperlinks and/or objects)





SureTrak Demonstration

- ◆ “Defining” the structure
 - Activity codes
 - Calendars
 - Resources
- ◆ Setting the “options”
 - Project *
 - General
 - Resource





SureTrak Demonstration *(cont.)*

- ◆ “Viewing” the project
 - Bar chart
 - PERT
 - Resource Profile / Table
- ◆ Using the “tools”
 - Print Dictionaries
 - Excel Spellcheck
 - Global Change
 - Code Wizard





SureTrak Tips and Tricks

- ◆ Paste from MS Excel
- ◆ Constraints
- ◆ Progress Spotlight
- ◆ Insert text/hyperlink
- ◆ Insert object/picture





SureTrak Tips and Tricks *(cont.)*

- ◆ Reporting
 - Series
 - Basic (SBL) scripts
 - Pivot-table Wizard
- ◆ Internet
 - Adobe Acrobat
 - Web-publishing Wizard
- ◆ Mail
 - Primavera Post Office





Closing Remarks

- ◆ This is worth the investment!
- ◆ Start with schedules
- ◆ Add resources later
- ◆ Use technical support
 - Phone: 1-610-667-7100
 - Website:
<http://www.primavera.com/support/index.html>
 - E-mail: sttech@primavera.com





Questions?

