



A CONVERSATION WITH BILL KRACUNAS OF VITALE, CATURANO & COMPANY

This month *The Edge* caught up with **Bill Kracunas, Director of Technology Consulting Services** for Vitale, Caturano & Company. Bill had a few minutes to reflect on the firm's recent CRM (client relationship management) implementation. Vitale, a full-service CPA and financial consulting firm located in Charlestown, MA, recently completed its rollout of **InterAction 5.0**. According to Bill, effective client relationship management is at "the heart of what we do here at Vitale".



Over the past few years Vitale has grown dramatically in size. The firm recently moved from the space it had held in Boston's North End to their spacious new location near the Charlestown Navy Yard. Until the InterAction rollout, Vitale had managed their client tracking efforts using a combination of Goldmine, a sales tracking application, and a home-grown, Lotus Notes-based, CRM tool. In the past, said Bill, the firm was small enough that "all the issues were always on the table" and it was easier for everyone to be aware of existing relationships with clients. As the firm grew to close to 200 employees, more robust tools were needed to "ensure that the big picture was always clear."

See [Kracunas](#), p. 3

LAWNET 2003: NETWORKING AND EDUCATION

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The **2003 LawNet Conference** held August 18 – 21 in Boca Raton, Florida, was an unqualified success! We had the best attendance of both members and vendors of any prior conference. But beyond the stats, everyone I surveyed said that they were filled to bursting with information about technology and how to make it all work for the legal profession. There were many excellent opportunities for peer-to-peer networking, which is really what LawNet is all about.

LawNet provides many opportunities *all year long* for networking and education. We have ongoing regional meetings, webinars and seminars. In addition, we offer a quarterly newsletter, white papers on timely subjects, surveys on technology trends and a constantly-expanding shared knowledge base at our extranet, MyLawNet. If you'd like to learn more about LawNet, please visit our website at www.peertopeer.org, or feel free to contact me anytime!

Working on Next Year's IT Budget?

Call ODC for
estimates to help you
plan ahead!



IT²: IT INTENSIVE TRAINING FOR WORD XP!

Have you been considering a conversion or upgrade to Word XP, but want to know all the potential issues involved? Perhaps you have already upgraded and your help desk staff is dealing with questions they weren't prepared for. Or, maybe you just want a better "behind the scenes" understanding of how Word XP works. *In any case, ODC's IT Intensive Training may be just right for you.*

The IT Intensive Training class covers all Word 2002 options settings, global templates, and the Windows registry. We discuss techniques on resolving Word startup problems, handling corrupt documents, and document conversion issues. Your staff will come away from the training with a better understanding of Word's architecture, standard features and settings, and how best to implement Word 2002 at your firm.

The class, while generally taught in one day, can be tailored for your firm's individual needs. Reference documentation will be provided to all students. Contact ODC to learn more about the IT² class and how it can benefit your firm.

ODC APPROVED AS A STATE TRAINING VENDOR

In May 2003, ODC became an approved training vendor for the **Massachusetts Workforce Training Fund (WTF) Express** program. Workforce Training Fund Express is a training grant program targeted to small employers and labor organizations in Massachusetts. The program provides businesses with the ability to purchase pre-approved skills training for its current workforce.

Businesses that employ fewer than 50 people can apply for a grant that will allow purchase of up to \$15,000 worth of training. Training

ASK OLIVIA

Dear Olivia,

I often create a table of contents using heading styles throughout my documents. But, if I have a paragraph where the "heading" is part of the paragraph itself, I can't use the Heading styles, so I'm stuck manually marking that TOC entry. Is there any help for this?

Signed,

Stuck on Styles

Dear Stuck,

If you use Word XP, there is a great solution – the Style Separator! This tool allows you to apply two different styles to one paragraph – such as a Heading style for the text at the beginning, and then a body text style for the rest (or whatever combination of styles you need).

The Style Separator tool is not usually on the default toolbar, so you may need to add it. Just go to Tools→Customize→Commands, select the All Commands category and scroll through the alphabetical list for **Insert Style Separator**. Add it to your toolbar and you're ready to go!

courses are chosen from a pre-approved listing of established training courses and vendors. ODC is very excited to become part of this program, and looks forward to providing quality training services to small businesses and labor organizations in Massachusetts.

To learn more about the WTF Program, visit www.detma.org/WorkForceExpress.htm, or call 1-800-252-1591.



KRACUNAS, CONTINUED FROM P. 1

A CRM tool like InterAction seems to be a perfect fit for the way Vitale does business. “Our model doesn’t follow a tradition sales approach,” Bill explained. “Our people don’t make a lot of cold calls to prospective clients. They effectively leverage relationships between people here at Vitale and potential clients and they also track relationships between clients. This often allows us to approach prospective business at the CFO/CEO level.”

Bill admitted that one of the greatest challenges to the rollout was porting all of the data from the separate existing systems. “In addition to the Notes and Goldmine data, we had to accommodate all of the personal Outlook Address Books and Contact folders as well a collection of data from Excel worksheets.” According to Bill, getting all of this data into InterAction cleanly, and without any duplication, was one of the toughest tasks to accomplish. “We spent the time to educate our people as to the importance of clean data, and through a series of desk-side training sessions provided by ODC, they acquired the skills and confidence to participate in the data cleanup and make that effort a success.”

Bill was pleased with the ease of integrating InterAction with other business-critical systems. “Given InterAction 5.0’s web-based interface, all it took was the addition of one custom field in InterAction and its users are now just one click away from our Engagement system.” Bill also found that links to the billing system were easy to implement, and synchronizations with Outlook now automatically execute without a hitch.

When asked what he felt was the biggest benefit in having InterAction 5.0 installed, Bill thought a moment and replied, “I knew that InterAction was going to allow us to better track our clients and give us one, centralized, clean data source. I knew it would integrate well with existing systems. I

knew it was going to help us leverage relationships, but I was truly surprised by how well it worked in actual practice. It very quickly provides you with all of the hidden relationships with clients and prospective clients that would have remained hidden were it not for InterAction.”

As for the future, Bill is looking at the new features of the recently released InterAction 5.1, but feels that there is still more to be done to leverage what they already have in place. Immediate plans call for integrating InterAction with additional existing in-house systems.

ODC and *The Edge* thank Bill for taking time out of his busy schedule to talk about Vitale’s successes with their InterAction rollout and we wish them luck in their future client relationship management efforts.

Quote of the Day
‘I do not fear computers. I fear the lack of them.’
- Isaac Asimov

ODC AT ITTC

ODC had a great time at the ITTC Conference held in Newport, RI earlier this summer – our first time attending as a training vendor.

It was the 26th event for the conference, and the theme – ‘Keys to Collaboration’ – held special significance for the people who visited the ODC booth. Each visitor received a ‘key’ with half the combination to a lock; participants needed to ‘collaborate’ with others to find the other half. Winning combos opened a lock on the prize box – three lucky folks received a one-year membership to the MFA in Boston.

The conference itself was informative, fun, and a terrific experience for ODC; we plan to attend again next year. Mark your calendars for June 21 - 23, 2004, and check out www.itconference.org for more details.

The Edge is published bi-monthly by Overall Domain Concepts, LLC. To learn more about ODC, or to add your name to our mailing list, please check out www.odcllc.net.

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