

# A Salesperson's Toolbox

29 APPS, DOWNLOADS AND GADGETS  
TO HELP YOU STAY CONNECTED IN THE DIGITAL AGE

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# The right tools for the job

I've been selling long enough to remember the days when only senior executives had "car phones." Back then, if somebody wanted to reach you they left a message at your office (with a secretary or receptionist), and you returned the call after you got back to the office. If a customer and I wanted to schedule a meeting, we each took out our Franklin Planners and wrote the meeting in by hand.

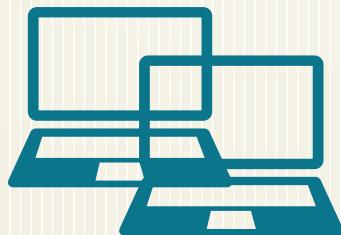
Now, I'm connected 24/7. Smartphone, tablet, laptop, desktop, Kindle. It's rare that I'm not operating at least one of these devices, and sometimes more than one. It's a challenge to manage a constant flow of information coming at us from all angles in a wide variety of formats.

In this ebook are 29 tools I use to stay on top of it all. Some only work on one platform; some work on all of them. At the time of this writing, I am using every single one of these regularly — and am always on the lookout for something better.

I use these tools on the following devices as of January 2015:



Dell  
desktop  
computer  
running  
Windows  
8.1



**Lenovo Yoga 13"** laptop, running  
Windows 8.1 — my "main" laptop  
**Dell 11"** laptop running Windows  
8.1 — a cheap one I bought as a  
spare when the Lenovo was in the  
shop



iPad Mini



iPhone 5

Some of the links in this document are "affiliate links." This means that when you click on the link, if you purchase the product I will receive a small commission. Regardless of whether I receive a commission, I only recommend products or services I use personally and believe will be good for my readers.

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## Anti-Social



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[\*\*Anti-Social\*\*](#) — Ah, the mixed blessing of The Internet... You might start with a legitimate piece of information necessary for your job. That article about social media trends has a link to a Buzzfeed list of the biggest trends of the year in social media. Before you know it, you're watching a video of a monkey riding a motor scooter, and two hours have gone by. Anti-Social helps protect you from yourself. You choose the websites you want to block (I've got nearly 20 websites on the list, and add more weekly), and how long you want to block them. At this writing it costs \$15, and it saves me hours every day.

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## AnyList



[\*\*AnyList\*\*](#) - Evernote is great as a digital file cabinet, and Wunderlist is my app of choice for organizing tasks. But sometimes all I want to do is just make a list. AnyList is a great tool that does that one thing — making, and perhaps sharing, a list — beautifully. My wife and I became fans when we discovered that AnyList syncs our grocery list between devices better than anything else we'd tried. Now I keep my own lists for errands on the road, items to order from Amazon, and gift ideas. Available for the web and iOS. No Android at this writing.

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**Any Video Converter** — I get video files in a variety of formats. Some just won't play on my computer. Any Video Converter is a piece of freeware that converts videos from one format to another. I use it to convert mpg files (which, for some reason, don't play on my laptop) to .wmv files, which will. Warning: some users report that the free version plants unwanted programs on their computers. I have strong anti-virus and anti-malware on my machines, and haven't had a problem. Your mileage may vary — as with all software you download, use caution.



**Azul** — As much as I love my iPhone and iPad, I am occasionally reminded that Apple and Microsoft don't always play well together. For example, when I want to play a Windows Media file on my tablet. Azul is a media player for iOS devices. It has a lot of bells and whistles, but my primary use for it is to play videos when the iPad or iPhone's regular player won't. Click on the file and it will invite you to "Open in Azul". Life is good.

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**Calendly:** Sometimes I need to schedule three meetings with three separate clients in the same week. The old way was to send each of them a list of available times, knowing that it'd blow up when two of them chose the same time. Now I use Calendly, which syncs with my Google calendar. I set the parameters (meeting length, days/times I'm available, etc). Calendly gives me a web link to send out. My customers only see the times I've made available; when someone chooses a time, the meeting appears on my calendar and that time disappears from what everyone else sees.

## CalenMob™

**Calenmob** - For some reason, my Google Calendar has never been able to fully sync with my Apple Calendar for iPhone or iPad. Items I enter in Google sync to my devices, but it doesn't work the other way around — when I enter an event in my iPhone calendar, it doesn't show up in Google. Calenmob syncs both ways, which means a much better chance that I show up where I'm supposed to be, when I'm supposed to be there. Calendars are easy to read, and entries can be made offline, to be synced later.

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**Carbonite** and **CrashPlan** — We keep our entire lives on a device. Our documents, pictures, files, presentations, videos. What happens if our device crashes, or gets stolen? Or if we delete something important by mistake? Carbonite and Crashplan are automated online backup services. Sign up, connect to the cloud, and they back up everything you have to their servers. It's all done automatically so you don't have to remember to do a backup once a month. Files can be accessed from a mobile device, which is a help if you need to look something over while away from your desk. If your computer crashes, or your laptop is stolen, your records are safe and easy to retrieve from another computer.



**CompanionLink**: I'm constantly making calendar entries and adding contacts on whatever device I have handy at the time. It's Outlook on the Desktop/Laptop, plus the calendar and contact apps on my phone and tablet. CompanionLink for Outlook keeps it all straight. An entry into Outlook is sent via CompanionLink to Google, which then syncs with my phone and tablet. You can schedule the syncs to be automatic — every few minutes or every few hours, which means one less thing to remember. It's a great way to make sure that everything says the same thing at the same time.

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# Compfight

**Compfight** - I like to use pictures in my proposals, on my blog, and in social media. I could just copy what I like from the web, but much of that material is copyrighted, and I don't like to be sued. Luckily, some photographers will share their work for free. Compfight is a search engine that interfaces with Flickr. Some of the photos cost money, but many are available free under a Creative Commons license. Often you can do anything you want as long as you give the photographer credit — and there is HTML code to make that easy. Read the license carefully before you download.



**Dollar Photo Club** - Sometimes the “free” photo sites such as Compfight just don’t have the image I want for my blog, e-book, or promotional materials, and I’ve got to swallow hard and pay for an image. The iStock Photos of the world can get pretty spendy. I’ve found the Dollar Photo Club to be an excellent low-cost alternative. It’s a membership subscription service starting at \$10 per month. For \$1 per photo (minimum 10 per month) you get access to a huge number of high-resolution images, licensed for most commercial use.

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**[Dragon NaturallySpeaking](#)**: I'm a pretty weak typist — both slow and inaccurate. Nuance Communications' Dragon allows me to speak rather than type. Much faster for me, and the spelling is impeccable. One occasional downside is word choice: sometimes Dragon misinterprets what I said, and chooses the wrong word, resulting in a sentence that makes no sense. Over time Dragon's learned how I talk, and errors are much less frequent. I use Version 12, which requires a headset or external mic. Nuance claims that Version 13 can work with your computer's internal microphone. If you use that, let me know how it works.



**[Evernote](#)**: Twenty years ago I was the guy whose desk looked like a bomb had gone off. Papers scattered everywhere... piles on top of piles. I insisted I knew where everything was. I was lying. Now most of the paper's gone — I scan it or snap a picture with my phone, upload it to Evernote, and throw it away. Evernote is the file cabinet I keep everything in, with a search function so powerful I can find anything by typing in a few keywords. Over the past couple of years Evernote has added some great features to their Premium edition. In particular, their business card scanner, while not perfect, allows me to import contact info into my phone, and connect to contacts on LinkedIn. There's an Evernote app for Windows, Mac, iOS, and Android, so you can keep it all connected.

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**Expensify** — It's a bad feeling to find a receipt you've lost, three weeks after you've turned in the previous month's expenses. I have Expensify on my iPhone to make my receipts stay found. As soon as I pay the check in a restaurant, I open the Expensify app on my phone and take a picture of the receipt. Expensify organizes all of the photocopies into an expense report, and does all the math for me. It's a simple process to download the whole report into a pdf and email it to my home office. The paid version interfaces with services like Quickbooks.



**FastEver Snap**  
Camera for Evernote

**FastEver and FastEver Snap** — I keep Evernote behind a passcode on my iPhone and iPad,. This can make writing a quick note a pain — I have to unlock Evernote first, and Evernote can take a while to load. FastEver allows me to write a quick note without opening Evernote up first. I just click on the icon and start typing. I can assign the note to a notebook and tag it. FastEver Snap is the same basic idea, but with a camera instead of text. Nothing earthshaking, just a couple of nice conveniences that make Evernote a little easier to use.

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**Feedly** - If you've got a lot of blogs, online newsletters and news feeds to keep track of, Feedly is simply the best way to organize it all. You can search for specific sites using Feedly's powerful web search tool. Once you find what you're looking for, a simple click of a button ensures that new content will show up in your reader as soon as it's pushed out. You can share articles on Facebook and Twitter with the free version; the "pro" version (\$45/year at this writing) lets you share on other platforms as well.



**Fellowes Crosscut Shredder** — A lot of the paper I receive --- bank statements, government documents, receipts -- has sensitive information on it, and I don't just want to put it at the curb on recycling day. When in doubt, I shred it. There's no substitute for having a decent shredder right next to the desk. I've had a Fellowes shredder for seven or eight years; I bought one of their lower-end models, and it's worked like a champ. The basket is easy to remove and empty. Mine will shred up to 7 sheets at a time, which is plenty for my needs.

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**Freedom** — I am sometimes so undisciplined that it's not enough to block specific websites with Anti-Social. Sometimes I need to be *completely* off of the internet. Freedom represents the “nuclear option” — I open the program, choose how much Freedom I want (anywhere from 15 minutes to 12 hours), take a deep breath, and hit Start. I’m completely cut off. No Google, no email, nothing at all until time expires. I don’t use it often, but when I have a presentation due and I’m on deadline, it forces me to behave. Available for Mac and Windows. Alas, not available for mobile devices at this writing.



**Fujitsu ScanSnap Scanner**: I try to get rid of all the paper I receive as quickly as possible. A good scanning device makes the job so much easier. I’ve been using the Scansnap for a couple of years now. It’s very compact, so it doesn’t take up much room on my desk; it scans smoothly and quickly; I can set it to deposit documents directly into Evernote, into another folder on my computer, or attached to an email. The only thing it can’t do is travel with me. On the road, I can get by with FastEver Snap on my iPhone.

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## LastPass \*\*\*\*

[Lastpass Password Manager](#)— If you've spent any time reading about the various online hacks that have taken place recently, you recognize the need to keep your passwords secure. My solution of choice is LastPass, a password manager that keeps my logins and passwords in a secure vault. I let LastPass choose all of my passwords with a random number/letter generator, which makes them much tougher for a thief to guess. The only password I have to remember is my LastPass master password. To secure my master password, I use [two-factor authentication](#) with Google Authenticator.



[Logitech Ultrathin Keyboard for iPad Mini](#) - I take all my meeting notes on my iPad Mini. It's not impossible to do that with the on-screen keyboard, but it's difficult enough that I won't actually do it. The Logitech Ultrathin keyboard is what turned my iPad from a toy into a work tool. The keyboard fastens onto the tablet with a magnet, and it folds into a nice, compact unit. The keyboard is small, and accuracy suffers a bit, but it gets the job done. Logitech makes [a similar keyboard for the iPad Air](#).

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MetaMoji Note

**[MetaMoji Note](#)** - When I began to use my iPad to take notes at client meetings, I realized I needed a template. Evernote, unfortunately, doesn't really have that capability. MetaMoji Note does, and has the capability to let me type or handwrite the notes. I can duplicate my templates multiple times, fill them in on MetaMoji Note, save them as PDF's, and then upload them directly to Evernote when I'm done. There's a free version called MetaMoji Lite, and a paid version with more features. Available for Windows, Android, and iOS.

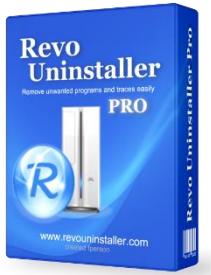


**[PhraseExpander](#)** - Typing the same things over and over is inefficient, time-consuming, and incredibly boring. With text expansion software, you establish an abbreviation for a sentence or paragraph, and the software makes your computer type the whole thing. I have tried several text expansion programs, and like PhraseExpander best. It can get spendy (there are free ones out there), but if you're willing to spend the money it is reliable, very user-friendly, and a very powerful tool. The "Professional" version has an option to install it on multiple computers and sync them so all have the same abbreviations.

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**Reply to All Monitor** — The “Reply All” email button can be an easy way for you to damage your career by sending sensitive information to the wrong person. Reply to All Monitor is an add-in for Outlook that warns you when you’re about to reply to everyone. The big picture is this: it slows you down and makes you take one more step before you do something stupid. That one extra step has saved me from heartache and despair an average of three times a year since I bought it.



**Revo Uninstaller Pro** — There are many reasons we might want to uninstall a program — we don’t want it anymore, or there are compatibility issues, or it’s planted adware or malware on our computer. Many programs bury traces in odd parts of the computer, such as the registry. I use Revo Uninstaller Pro to do a deep search to find all the little bits and pieces that Windows’ “Uninstall a Program” option leaves behind. My machine’s innards are that much cleaner, and everything runs that much smoother.

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**Snagit** — I often need to capture images on my computer — company logos for presentations, error messages to send with a tech support ticket, screen shots of a client website for a consultation. Snagit lets me choose exactly what I want to copy, annotate it, and save it to my hard drive in a variety of formats. Although it is not a full video-editing suite, Snagit also does a good job on simple screencasts when I need to produce a short instructional video — and makes it easy to upload the video to YouTube.



**TripIt** — I travel about 24 weeks a year on business, and the TripIt travel organizing app is absolutely indispensable. Whenever I book a flight, hotel, or rental car, I email the confirmations to TripIt, and it files things away in separate itineraries for each trip. From my computer, smartphone and tablet, I can look up “Bakersfield January” and see exactly when I’m flying, where I’m staying, and what I’m going to be driving. I’ve given my family access to my “Inner Circle” site so they always know where I’m supposed to be.

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**Witopia** — any time we log onto a public network in an airport, a hotel or a Starbucks, we're putting our data at risk. Anything we send out can be captured by a nefarious stranger bent on misusing it. A Personal VPN prevents much of the hinky stuff by encrypting everything before it hits the public airwaves. There are many free and paid VPN services available. I've been using Witopia for about three years. It's easy to download, easy to engage, and works on a variety of devices.



**Wunderlist** - I've tried a variety of tools for keeping To-Do lists. Outlook can't be shared among my devices; Evernote's Reminders feature isn't flexible enough. In 2014 I discovered Wunderlist, and while it's not perfect it's the best option I've found to date. It syncs from Windows desktop to iPhone to iPad, allows me to combine tasks into categories ("Work", "Family", etc), and check them off when the task is complete. Due dates are easy to set, and there's a new iOS widget that puts the tasks of the day on an iPhone Notification Screen.

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[Zamzar](#) — a web-based alternative if you need to convert video files and you don't want to put a product like Any Video Converter on your computer. Zamzar claims to support 1200 video and audio formats. You upload your file, specify the format you'd like to have the file in, plug in your email address, and wait. A short time later (usually within 10 minutes) you get an email with a download link. The basic version is free, but limits you to files of 100MB or less. If you have larger files, there are several paid plans.

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Thanks for reading this guide – I hope these tools help you as much as they've helped me!

For more on sales, marketing, advertising, and tech tools to get the job done, check out my blog at [www.philbernstein.com](http://www.philbernstein.com).

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