



Chief Operating Officer Business Forum, Inc.®

COO Forum®

COOs Sharing Ideas about Technology

by Bill Shepard, Founder & CEO at COO Forum

In the month of December 2019 three COO Forum Chapters that I facilitate, San Francisco, Silicon Valley and our Remote Zoom Telemeeting with International/US-wide COOs, spent half their monthly meeting time in a relaxed session of fun, no boundary, blue sky discussion across the spectrum of technologies that they use, know about, and plan to deploy.

The meeting approach was that anyone could share anything as we crisscrossed from enterprise to apps, serious business solutions to out-of-the-box fun, all with a relaxed, yet enthusiastic energy. At times the energy got frenetic but all in the mission to share knowledge and experiences on Technology.

As the Founder/CEO of the COO Forum, I welcome you to share these findings with your connections and colleagues.

A very special *thanks* to all the COOs and Second-in-Command Executives who contributed to this document.

Productivity

BYO App – Embrace it. Realize that your team will bring their own apps for their own productivity and sharing.

Integration of Platforms: All of the middleware, which best helps integrate existing platforms.

- Should we standardize or let people be autonomous?
- We all agree that every company needs to have or decide on a certain framework they will work with. If they don't agree on that framework for decisions and steps to execution, no amount of systems or tools will help as it may just accelerate the mess they are in.
- Companies need to decide very firmly which data sets they require or tools across the whole business and need to be standardized and enforced.
- Identify what is functionally-specific, and then let the organization use what they want.

Agenda www.agenda.com Date-focused note taking. Excellent support for handling tasks. Planning and documentation for projects

Avalara www.avalara.com Simplify sales tax with automations.

Box www.box.com Content management, workflow and collaboration. Used as a file server. It's constantly backed up and don't worry about files kept on a computer.

Canva www.canva.com Easily create beautiful designs and documents. If you aren't a designer this is a great tool.

CaptivateIQ www.captivateiq.com/ Sales Compensation (commission calculation & comp plans), pulls data from Salesforce.

Concur www.concur.com Travel and expense management.

CongaMerge www.conga.com/salesforce Document automation in Salesforce to automate parts of your workflow.

Dropbox Paper www.dropbox.com/paper Collaborative workspace - collaborate in real-time, assign tasks, make a to-do list and more.

Fig Leaf www.figleaf.com Creating the best consumer privacy solutions.

Fishbowl www.fishbowlinventory.com/quickbooks-erp/ Instituted new ERP Platform this year. Inventory management and production scheduling. Been refining and getting better at it. Critical to make sure everyone's on the same page.

FreshDesk www.freshdesk.com Cloud-based customer service software providing helpdesk support with smart automations to get things done faster.

Geopointe <https://www.geopointe.com/features/heat-mapping/> Heat map tool that can be used to show revenue hot spots or lead cold spots.

Gong www.gong.io/ Conversation intelligence platform B2B sales teams that records, transcribes and analyzes all sales calls and interactions to increase effectiveness of sales conversations. When on sales calls it records the calls and creates infrastructure so nobody needs to listen to very single call. Creates training bank of calls for you.

GoogleSuite gsuite.google.com Easy management and control for teams.

Hubspot www.hubspot.com Full platform of marketing, sales, customer service and CRM software. Store everything with Amazon Web Services (AWS) – some do this, but not all.

J Curve Solutions www.jcurvesolutions.com/jcurve-erp/ Cloud ERP Software made for SME growth.

Mode www.mode.com Increases the speed of better decision-making regardless of the complexity of the problem at hand.

Netsuite www.netsuite.com Unified business management suite, encompassing ERP/Financials, CRM and ecommerce. Not crazy about reporting function; difficult to navigate. Downside. Great capabilities but reporting not great. Some outgrow Quickbooks and see Netsuite as a next stop option.

1Password www.1password.com Password manager. Originally came out for the Mac now Android, iOS, Linux, etc.

Quickbooks (enterprise version) www.quickbooks.intuit.com Accounting software package.

Remix Transit www.remix.com Helping planners make better decisions. Can draw a line and sketch a route telling how many buses you need. Very robust with the amount of data you get. Strictly B2B. This is part of their offer.

Roboform www.roboform.com Password manager. Paid version for teams and free version for personal. You can include people in groups and they only have access to the passwords. Always updating. Encryption process looks decent.

Tableau www.tableau.com Business intelligence software that helps people see and understand data.

Tibco www.tibco.com Complete analytics solution in the market, and makes it fast and easy for everyone to visualize new discoveries in data.

SaaSOptics www.saasoptics.com/ Automating revenue recognition.

Salesforce www.salesforce.com CRM solution. Used both for B2B sales – really the storage of all of the data, but some also use Hubspot along with Salesforce.

Slack www.slack.com Real-time messaging, file sharing, and powerful search. Internal communications tool, so some choose not to use email. Some say you have to go all-in with Slack, or it gets distracting to do email and Slack. Teambuilding and social interaction also good, especially for remote organizations. Overuse it a bit, but a great tool when used correctly and with discipline.

ZoomInfo www.zoominfo.com Subscription based lead generation.

Zuora Revpro <https://www.zuora.com/products/revpro/> Revenue automation solution.

Talent Acquisition

Very challenging when dealing with pipeline of over 1M people. We are seeing a lot of AI taking over the traditional recruiter's role in screening applicants in and out. You can't ever replace the human touch and at some point in the process, a human needs to be in touch. Difficulty staying in touch with new technologies – so rapid.

Allyo www.allyo.com HR Communications platform to engage employees and candidates; does AI on front end for talent acquisition. Sole proprietors to companies like Walmart. They can scale rapidly and still serve interest of the smaller companies. Good time for small and medium to have the same edge as larger companies.

BetterWorks www.betterworks.com/ Continuous performance management.

Erecruit www.erecruit.com Staffing software solutions.

Gem www.gem.com Software recruiting CRM.

Greenhouse www.greenhouse.io/ Talent acquisition suite.

HarQen <https://hargen.com/> Live, on-demand and multi-tenant tool; next best thing to a personal interview.

HireVue www.hirevue.com Used for remote recruiting.

iCIMS www.icims.com Talent acquisition suite.

Indeed www.indeed.com Job search engine.

JobBot www.jobot.com Career platform; recruiting and staffing.

JobVite www.jobvite.com Talent acquisition suite.

Lattice <https://lattice.com/integrations> Performance management and employee engagement.

LinkedIn www.linkedin.com Appeals to Europeans tremendously. Europe did not pass some of the EEC laws until 2006, so European hiring method much different than the US. LinkedIn has suffered some hits because it's acting too much like a Monster job board. It used to be more of a professional forum, but it's become a headhunting job search pool. Wonderful tool for recruiting, yet be cautious because it's not always truthful. Very self-promoting.

Reflektive www.reflektive.com/performance/ People management platform that helps employees and managers work better together.

Taleo <https://www.oracle.com/applications/taleo.html> the IBM version of talent acquisition of software.

Udemy business.udemy.com Learning for teams. Business technology and software courses taught by experts.

VidCruiter www.vidcruiter.com Online video interviewing platform.

ZipRecruiter www.ziprecruiter.com Job search engine.

Zoho www.zoho.com/crm/ CRM tremendously helpful in tracking LinkedIn leads and connections.

Out of the Box Fun

Any.do www.any.do The to-do list you could actually stick to. Task manager.

Blinkist <https://apps.apple.com/us/app/blinkist-read-in-15-minutes/id568839295>
Read book summaries in 15 minutes.

Calm www.calm.com Meditation app promising better sleep and less anxiety.

Call Protect <https://www.att.com/features/security-apps.html> Helps prevent scammers, telemarketers and identify theft. It's by AT&T

Evernote www.evernote.com Note taking app.

4MinuteRead www.fourminutebooks.com/ Read a summary of a book in four minutes.

Iexpenseit <https://apps.apple.com/us/app/ixpenseit/id284947174> Simplifies daily expense tracking and monthly budgeting.

iNaturalist www.inaturalist.org Explore and share observations from the natural world.

InstaRead <https://instaread.co> Access to bestselling book summaries all available in 15-minute audio or text summaries.

LeaderBooks www.leaderbooks.com Monthly reading experience for leaders who don't have the time. Fast summaries, action ideas, etc.

Life360 www.life360.com Smart features designed to protect and connect family.

Lumosity www.lumosity.com Brain games.

Myshake <https://myshake.berkeley.edu/> Earthquake warning.

Pocket <https://getpocket.com/> When you find something you want to view later, put it in your Pocket app.

Things3 www.culturedcode.com/things/ Productivity tool for planning and executing your personal projects.

TouchNote <http://touchnote.com> Upload photo and do silly stuff to it and then it mails to someone. Creates cards and postcards through US mail for you that send automatically without ever having to lift a pen or lick a stamp.

About the COO Forum®

The COO Forum offers a safe and confidential small group peer-to-peer meeting for standing COOs and other Second-in-Command Executives across a spectrum of industries and company sizes. Participants are expressly from companies with full operating disciplines and professional leadership teams. The COO Forum is US-wide and is by invitation only and there is a modest fee to join. Members have access to our private and confidential *COOeForum*.

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For more information:**Bill Shepard**

Founder & CEO, COO Forum

Silicon Valley, California

bshepard@cooforum.org

408.206.7953

Laura Weikle

EVP, COO Forum

Atlanta, Georgia

lweikle@cooforum.org

770-366-1123

Related Links: <http://www.cooforum.org>