

## Marlene B. Brown's July 2000 Marm's Memo – Complete Version



**TechnoTouch**  
WEB DESIGN/NET MARKETING

**B2B E-PROVIDERS.COM**  
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**B2B GROWTH:** The Business-to-Business industry is the new e-commerce hero. Jupiter estimates Business2Business online revenues will reach over \$6 trillion by 2005, a twenty-fold growth over the current \$336 billion. Currently, 92% of B2B business online is conducted through the traditional direct channels sales. By 2005, 35% of these businesses will have shifted to the net market model. According to Jupiter, e-commerce has captured only a modest 3% of total business-to-business transactions. Projections are that B2B penetration will be 6% in 2001, 12% in 2002, and 22% in 2003.

Forrester Research expects one of the fastest growing B2B web plays, the market of online auctions for excess inventory, will reach \$52.6 billion by 2002. The sheer number of small businesses jumping into the b2b e-commerce arena will ensure a dramatic impact. EMarketer's recent report estimates the number of small businesses online at 4.5 million by the end of 2000, accounting for 60% of all small businesses and leaving almost 3 million yet to connect.

Just being online is only the first step. Next, businesses must establish an active website, and carry out business operations online, reducing costs and increasing sales. Researchers estimate medium and large business connectivity is above 90%. Small businesses are catching up, 78% predicted to be online in 2001 and 82% by 2002. While 57% of medium and large businesses have active websites, in 1999 only 8.5% of small businesses had active sites, with 34% putting up sites in 2000, jumping to 57% by 2002.

Many catalog retailers have found remarkable success online – in some cases surpassing brick-and-mortar retailers that have moved online. A recent study from Boston Consulting found that of catalog companies that have moved online, 72% are profitable. Although it's not likely catalogers will discontinue catalogs, online catalog companies could cut the number of catalogs sent in half and retain customers while significantly reducing high catalog-distribution costs.

**BANNER ADS:** Today, most authorities agree that less than 1% of all web ads get clicked on, down considerably from the early days of the Web (circa 1997) when CTRs hovered in the 2-3% range. But what do you really want -- warm bodies or qualified leads? Do you want lots of eyeballs, or lots of customers? Knowing how to acquire the difference is critical in Net marketing.

**BIOTECH:** We've come a long way from the days of Plato when he asked what the good life might be. Scientists and Religious thinkers gathered for a Conference on Bioethics in the new millennium. The debates between both sides will continue as they face an array of new technology concepts.

**CABLE CONNECTING:** Broadband is in constant demand these days. One bottleneck is called "the last mile" problem, that of moving data from a local phone switch to the POP of a national ISP. Before Internet TV can be fulfilled, sharing of links to switches slows things down during busy hours.

Currently, you can't beat the efficiency of cable modem. My Adelphia connection enables uploads and downloads to fly in and out in seconds. And their customer service has been phenomenal.

Their Power Link is blazing-fast high-speed Internet access through your cable line -- much, much faster than ISDN or any dial-up modem. They've eliminated tariff charges, per-minute access fees and hefty modem costs. And as part of their Customer Care program, even the installation hassle is history: they come to your home or place of business, hook everything up and personally make sure it works. Cable television and Power Link signals do not affect each other. Check 'em out! [www.adelphia.com](http://www.adelphia.com)

**CEO CHALLENGES:** 72% of executives recently surveyed said their companies are extremely or moderately active in creating or maintaining an e-business strategy. However, there is some confusion at the top and in board rooms about e-business and its relevance to business strategy. Read more in full version.

**CUSTOMER RELATIONS:** Relationship Management is a new strategy for delivering superior customer service in order to acquire, develop, and retain a company's most important assets -- its customers. It demands understanding what's important to individual customers, and making this available to anyone who needs to have access to it, to consistently satisfy those needs during every customer interaction. Recognizing that the top 20% of customers represent 80% of a company's profits, unique loyalty programs will grow.

**E-SERVICE:** Known also as web customer service, e-service has been proven to increase customer retention and decrease support costs. Knowing the secrets to successful e-service, and the essential customer service tools, are critical to success in e-business. Datamonitor reports that poor online service cost e-retailers more than \$6.1 billion in sales. The report emphasizes that retailers must focus on establishing excellent customer service or face losing USD173 billion in "potentially salvageable" sales.

**E-COMMERCE BOOST:** The world's largest company, US-based General Electric, has recorded a 20% rise in its Q2 profits, thanks to its increasing activity in e-commerce. The company's earnings rose to \$3.38bn from \$2.82. The increase for the 108-year-old company, in sheer dollars, is \$600 million. Executives of the conglomerate -- which spans electrical distribution, power plants and jet engines -- said the company would continue to cut costs and improve its bottom-line by doing business over the internet.

**ELECTRONIC SIGNATURES:** US President Clinton signed an electronic signature bill into law at Congress Hall, both electronically and with a pen. The law, which becomes effective on October 1, 2000, will give legal standing to documents signed using electronic means. With this act, the US joins 18 states that already have some form of digital signature law. Intended to encourage and enable online commerce, the bill is described as "an act to regulate interstate commerce by electronic means by permitting and encouraging the continued expansion of electronic commerce through the operation of free-market forces and other purposes."

A signature is merely a way to assure that a particular person is the one making an agreement. For most of history this has been done with seals, often with Notary Publics, as a way to authenticate documents, because not enough people could write. Digital signatures will work the same way, with a unique component -- verification authorities, similar to the combination of the coding on your ATM card, and the Personal Identification Number (PIN) that you enter into the machine. Banks, financial institutions, and medical networks will move quickly on this.

Is Electronic Bill Payment something you should be looking at? Here's one example for you to ponder. According to Insight Research, traditional bill presentment and payment for telephone companies costs \$2.50 while electronic bill presentment & payment cost is only \$.02

**E-RETAIL INCREASE:** Consumer Online reports that online retail sales jumped 12% in the first quarter of 2000. Q2 sales are predicted to grow another 25% over Q1 reaching \$10.2 billion. Sales and orders topped 1999's peak holiday-driven fourth quarter. Q4 1999 brought in a \$7.25 billion, while this year's first quarter brought in \$8.15 billion. Similarly, orders jumped from 70 million in Q4 to 75 million in the Q1. The average purchase amount per order increased 6% from \$103 to \$109.

**EMAIL RESPONSE TIME:** More than 2 in 5 US and UK public companies fail to reply promptly to customer queries submitted online. A Rainier study examined the use of the Web as a communications channel by the FTSE 100 companies and the top Fortune 100 companies. Only 71 of the FTSE 100 companies in Britain could be contacted via email on their website. 20% of these failed to reply to simple requests for investor information and 29 companies could not be contacted via email on their website.

In the US, 23 companies could not be contacted by email via their website. Of the 77 Fortune 100 companies that could be contacted by email, a third did not respond after 3 months, 38 replied within 2 days and 19 took longer. "All too often, companies focus on the content and look and feel of a site without considering its integration with existing customer contact systems. The result is that 2 in every 5 of the Fortune 100 and FTSE 100 Web sites are little more than corporate wallpaper," commented the Rainier chairman.

**GLOBAL INTERNET POPULATION:** There are now 15.34 million Internet users in Korea, up 1.4 million from the end of 1999, according to the Korean Ministry of Information and Communication. A new report from the Ministry says that a quarter of Koreans now use the Internet occasionally. Three in 5 Danes over age 15 have Internet access; 1 in 3 use it daily. According to new research by Danish consultancy group PLS Ramboll Management, over 600,000 new users have come online in the past year and more Danes have now used the Internet than have used mobile phones.

According to WhichOnline, almost 13 million people now have Internet access in the UK. The numbers of women, people over 55, low-earners and children with Internet access has risen substantially in the past 12 months. Ten million people have access to the Internet in Britain and 51.9 percent of those are male, according to the latest research from MMXI Europe. Meanwhile, women and children aged 2-14 account for 36.6 percent and 11.8 percent of the online population respectively. It reports 4 million online in France, 8.7 million in Germany, 5.5 million in Austria and 3.9 million in Sweden.

Chinese ecommerce revenues are expected to top CNY800 million (USD96.7 million) this year and will increase more than ten-fold to CNY10 billion (USD1.2 billion) over the next two years. There are only 1000 Chinese companies running ecommerce sites, most of them retailers. The Chinese government is promoting the b2b sector and aims to help 1 million Chinese companies to establish a web presence. In the last decade, Israel has undergone an astonishing transformation into a technology hub, having the highest number of high-tech start-ups after the United States, but they still lag behind competitors by Internet usage.

**GSM UPDATE:** According to the GSM (Global System for Mobile Communication), worldwide mobile phone users rose 22 percent to 331.5 million in the first 6 months of this year. They predict there will be 462 million users by the end of 2001 and 733 million by the end of 2004. Subscribers are concentrated in Europe and Asia-Pacific. In North America CDMA (Code Division Multiple Access) is

the dominant standard, with subscriber numbers having risen to 67 million by the end of June, an increase of 5.2 million in two months.

**INFORMATION TECHNOLOGY:** According to a recent report by former US Commerce Secretary William Daley, electronic commerce and information technology have become "the driving force of the American economy." The digital economy promises personal income gains, lower inflation, and lower unemployment, the report says. For example, information technology jobs grew by 30% -- from 4 million to over 5 million -- from 1994 to 1998, and these jobs offer substantially higher than average salaries.

**INTERNET SHOPPERS:** eConsumer reports that almost 34 million of U.S. households are actively using the Internet, and 23.5 million have made a purchase. By year-end 2000, the number of US Internet shoppers will increase by 73% to 63.4 million with revenues reaching \$37 billion. By 2003, that number will soar to 106 million, with online consumer shopping growing to \$104 billion. 68% of all US web users will be shopping online by year-end 2000, and 77% of Internet users will be shopping online by 2003.

According to a recent study of Internet users, 63% of those who shop online more than once a week are women, with women's dominance as web shoppers occurring faster than expected. In 1995, women made up just 15% of Internet users, currently it is 50%. Over nine million women have logged onto the Internet for the first time in the past year, with 58% of all new Internet users women. Research shows women will outnumber men on the Internet by a 3-to-2 margin by the year 2003.

**INTERNET DOMAINS:** At a conference in Japan, the Internet Corporation for Assigned Names and Numbers, a private corporation overseeing changes on the Internet, approved the creation of the first new top-level domain names on the computer network since the 1980s. The decision will bring additions to existing Web site suffixes such as ".com" and ".org." The addition of new names is aimed at boosting competition among companies that sell and register domains for Web site owners, and giving customers more names and vendors to choose from.

**INTERNET STARTUPS:** With numerous entrepreneurs becoming millionaires and billionaires in the Internet economy, knowing how to fund a startup, what the funding sources are for the various stages of financing, (Seed Money, Angel Investors, Incubators, Venture Capitalists) and how to approach each of them, is critical. Venture-backed investments skyrocketed from \$14 billion in 1998 to nearly \$36 billion last year, funding 4,000 business plans. However, for each plan that was funded, investors rejected 10 others.

When working with startup companies, I counsel them to get a good lawyer to handle details, assemble a team of advisers composed of people with expertise in the business world, and be prepared to tenaciously give it their all. I share with them the pro's and con's of each of the funding sources, what each of these sources are looking for, counsel them on who to trust – when. A business plan is needed, overselling will hurt, a high-quality management team will help. Down the road: buy-out or IPO options.

**JAVA USE:** Forrester research reported that of Fortune 1000 firms surveyed, 62% already used Java™ for some development, and 40% expected Java to play a strategic role in their companies. Originally designed as a language and architecture to be used in set-top boxes, and migrated into the Internet environment, Java is here to stay in today's IT environment. An independent platform, Java works on all commonly available platforms, permitting enterprise wide collaboration.

**LINUX EXPLAINED:** Linux is an operating system that can be run on all kinds of computers, including most of what the real world uses, like IBM PC compatibles and Macintoshes. This means it

runs software written for Linux, as opposed to software that's written for Windows or MacOS. It's more stable and a lot more secure than Windows or MacOS, so you gain certain advantages in giving up old 'legacy' software. While you won't be able to run Microsoft Word or Photoshop, you'll be able to find certain 'work-alikes' to help you get your work done.

Why is Linux being touted as the coolest thing in the computer industry? Because people are excited about working in an environment that inspires Open Source – the concept that people will be able to have access to the source code of a program, instead of just having a runnable program. It gives people the ability to tailor a program or application to do exactly what they need it to do, not just what the manufacturer thinks. Linux is an operating system designed and maintained by thousands of volunteers working on it for free.

What does this mean to you? It means the total cost of a computer drops considerably, because you won't pay for software anymore, and it means that you control the destiny of what you do with your computer instead of a corporation calling the shots. Companies will share their finest technologies and ideas instead of hoarding them as trade secrets, forced to compete instead of waiting on other companies to get their act together. The Linux community is made up of millions of people from all walks of life that subscribe to the ideals of Open Source, including programmers, system administrators, writers, musicians and poets.

Big companies like IBM and Apple have released Open Source software, as have mom-and-pop computer shops all over the world. People have had enough of unreliable computers and unresponsive technical support, and are putting their foot down with the collective. Some members of the community are revolutionaries with ideology in their mind and fire in their eyes, others are people whose employer's want them to find a solution that works.

**MARKET NEWS:** Fed Chair Alan Greenspan's remarks before the Senate Banking Committee, that rising budget surpluses, modest inflationary expectations, and demand is moving into line with supply - along with IBM's impressive gains -- propelled the market, with tech leading the advance. Then...

**MEDIA:** Fairfield Research reports the amount of time spent reading last year: 39% for magazines, 37% for books and 12% for newspapers. Radio and television still dominate media consumption, capturing 41%. Interactive media, including the Internet and video games, account for 26% while print media holds onto 19%.

**MULTI-TASKING LIFE:** As if days weren't long enough, a recent MTV/Viacom study show that by using existing forms of media simultaneously, consumers have packed 24% more activity into their days by multi-tasking. Instead of making trade-offs between activities, respondents were incorporating existing activities with new ones. For instance, TV viewing did not decline with increased Internet use. More than one-third of Americans now have a TV in the same room as their PC.

**NET TAXES:** Wall Street ratings agency Standard & Poor's said the projected boom in online sales does not threaten state and local governments with an immediate decline in sales tax revenues. Sales over the information superhighway, which states would find hard to tax, trailed those made through more established retail avenues. With the booming economy, the sales tax revenue base is strong. Estimates of current Internet sales are still too uncertain to warrant being factored into the rating equation for municipal bond issuers.

**NET GOLD RUSH:** Having been on the Web for a living since early 1994, and having worked online for nearly 5 years before that, it's interesting to look at where it started and where it's going. Tim Berners-Lee's work came directly from the CERN lab, which practiced the scientific principle of openness. Those who worked with the pre-Web Internet saw a future where honest communication

would bridge gaps and change the world for the better. The joy of finding someone else who understands that hasn't changed.

Born of science, the Web went through its gold rush period with early major players like Netscape, Yahoo, and Amazon. Certain assumptions drove the boom. The advantage of being first, and the demands of brand all drove budgets to unbelievable heights. The "dot com" Super Bowl saw companies throwing their entire stakes on a single 30-second spot. As time passed identification became simpler - from http:// to www to simply .com - by the end of this year even the .com will be redundant. A company's Web address has become its name.

Along the way great fortunes were made, others were lost, and new buzzwords appeared and disappeared. Some industries and people lost their livelihoods, and many people were threatened by the rise of the Web. Middle managers were no longer needed. Government and special interest groups had their authority challenged. Friends and enemies were just a click away. The Internet and the Web will continue to reshape our future over the next several years in ways we can't even imagine. Tighten your seat belts!

**OFFLINE/ONLINE PROMOS:** In a recent report, ActivMedia projects that promotional spending by web businesses will reach \$12.7 billion by year-end 2000, with 30% of spending directed at online promotion, and the remainder allocated to traditional media outlets such as print, television and radio. Growth in traditional marketing strategies for web businesses will continue to grow as the Internet itself becomes more of a platform for traditional commerce.

#### **ONLINE FACT STATS:**

- 161 million people are currently online - 510 million people are projected to be online by 2003
- Online shopping will account for \$108 billion in sales in 2000, growing from \$7.8 billion in 1998
- Online shopping will account for 6% of all U.S. retail sales by 2003, growing from 1% in 1998
- A survey of 150 of America's top tech professionals revealed that only 2% of them are under 30, and that 85% are actually 41 or older.

**P-TRIP TO MARS:** According to NASA, a plasma-powered rocket could cut the travel time to Mars in half, perhaps allowing humans to explore the solar system in the next decade. Extremely hot, magnetically charged gas, Plasma makes good rocket fuel because it can be held, guided, and accelerated by magnetic fields. The flight to Mars would take a little over 3 months, compared to the 7-8 months required by a conventional rocket. Mars Global Surveyor discovered evidence there might be liquid water at or near the surface of Mars.

**PUBLISHING EVOLUTION:** Some have predicted "TV that we read and books that we watch." Book lovers and printing companies have been watching the evolution of the publishing technology. It's about the transformation of a civilization embracing inevitable change. While reading is a mental activity where you're alone inside your own head, and the new forms of communicating let us reach out and be reached -- anytime...anywhere -- from our homes, our offices, or in a mobile mode, books still have a valuable place in our lives.

**RECIPROCAL MARKETING:** It used to be common to spend \$100 or more acquiring a new customer. Now, many Internet merchants -- e-tailers -- say their figure is a lot closer to zero. This is accomplished by a marketing technique called reciprocal marketing. Not widely practiced in the bricks-and-mortar retail world, it allows companies to offer their paying customers discounts at other online retailers. As the e-tailing market increasingly consolidates, reciprocal programs will grow in popularity.

**SECURITY ISSUES:** Viruses and other destructive actions by computer hackers will cost businesses around the world USD1.6 trillion this year alone, as almost 40,000 person years of productivity will be lost to computer downtime. Viruses and hackers are now seen as real threats to business. In the US alone, 6,882 person years of productivity will be lost this year to malicious attacks on computer systems. The total cost to American businesses will be USD266 billion, or 2.7 percent of the country's GDP.

**TECH KNOWLEDGE:** Most managers are frustrated trying to find the right people. Even after they match the skills of new hires with the jobs they have open, they're still facing a shortage of people who can think for themselves, improvising and innovating. Technical knowledge is a tool that can be acquired, but finding people who can take the knowledge and apply it effectively is a skill.

**TELECOM BILL:** The wireless industry was made happy this week when the Senate voted 97-3 to approve S. 2330, introduced by Sen. William Roth Jr., which would immediately repeal the 3 percent federal excise tax on telecom services. "The wireless industry is encouraged by the strong bipartisan support shown in the Senate," said Tom Wheeler, CEO of Cellular Telecom Industry Assoc. The excise tax on telecom services was enacted as a temporary levy in 1898 to help pay for the country's costs in the Spanish-American war.

**VIRTUAL PERSONNEL:** Imagine teleworkers presenting a well-dressed, perfectly groomed image to clients over a videophone, while working in pajamas? Imagine buying online from a virtual movie star or sports celebrity? A new technology in the works, called The Digital Personnel system, will manipulate an image of a person's face as that person speaks, making the image appear to be speaking naturally in real time. The technology will use a lower bandwidth than video transmission, allowing it to work over phone lines.

**WAP FUTURE:** Wireless Application Protocol (WAP) is the term for a way to access Web content over mobile telephone. WAP usability is not the greatest, with small screens, slow bandwidth, digit-only keypads, and the need to place a new call every time the device has to connect. With freedom of speech a basic tenet of the traditional Internet, the shift is to what's called "Internet mobile" -- future mobile services with bigger screens and faster, always-on connections.

**WEB ADVERTISING:** Predictions are that online advertising revenues will reach \$28 billion by 2005, up from \$4.3 billion in 1999. The main source of this growth will be the rise in number of Internet users from 200 million today to 600 million in 2005, with sharp growth in web ad revenues in the year 2000, reaching over \$7 billion. Global competition for web advertising dollars will heat up among web content providers and publishers. By year-end 2000, the average Internet buyer will purchase \$627 worth of goods online, up from \$500 in 1999.

By 2003, the figure will double to \$1,033. Internet ad spending in 2003 will still only represent 4.7% of total ad media spending. 93% of Internet shoppers will become Internet buyers in 2000. The largest untapped US customer base is minorities, with senior citizens rapidly growing to become the second-largest untapped base. While the US is currently dominant in online ad spending, Europe is the next frontier.

**WEB PAGES ON NET:** A recent study by Cyveillance reveals there are 2.1 billion unique, publicly available pages existing on the Internet, with more than 7 million new pages being added each day, meaning it will double in size by early 2001. Their report says the Internet's highest rate of growth is still to come and predicts there will be more than 4 billion pages on the Internet by early 2001, with 84.7 percent of those pages US-based.

The average web page is 10KB in size, contains 23 internal links and 5.6 external links, and 14.4 images. With the number of pages being created accelerating, it demonstrates that the Internet has not yet reached its greatest period of growth. How can you achieve rapid growth? High volume e-commerce websites tend to rely on search engines and directories.

**WEB USAGE:** A recent Nielsen survey revealed that in May, more than 1 of every 5 Internet users visited a financial site. US Internet users in the over-55 age group are increasingly incorporating the Internet into their daily lives, according to Greenfield Online. The "Surfing Seniors Digital Consumer" survey found that only 5% of surfers in this age group do NOT use email, and only 11% have not purchased goods or services online, meaning that surfers are far more likely than the general online population to buy on the Internet.

**WHAT'S FREE:** We all know that nothing's "free" -- we give up something. In the case of free ISP's, we forfeit some of our privacy and a lot of personal information, such as email address, full name, home address, gender, education, occupation, income, etc. This information can be re-sold. Free websites with banner ads tend to be annoying. If you wouldn't put your finances or your health care in the hands of amateurs, perhaps you shouldn't do so with your email and web page.

**WHIMSICAL:** There's a Wild Wild West shootout going on in Albuquerque, New Mexico with independent filmmakers. However, instead of guns, the shooters are armed with digital cameras as the festival focuses on making 10-minute films, made possible by digital equipment.

**WINNERS:** All eyes were on the talented champs Tiger Woods at the British Open, Lance Armstrong at the Tour de France, Venus Williams and Pete Sampras at Wimbledon. Boilermaker 2000 and Distance Runner's Hall of Fame Inductions, held in Utica, NY (the country's largest 15k road race) had their fair share of great talents, including record breakers. Check out pictures of a wonderful weekend event headed up by Earle Reed & Joe Kelly & their teams.  
<http://www.technotouch.com/BoilerHoF00.htm>

**WONDERLAND:** Some of the recent special moments spent with family, friends, community have been: Viewing birds in the feeder outside my office window. Receiving digital pictures of grandchildren for our Family page. <http://www.technotouch.com/FamShots.htm> Taking pictures for a client at a Car Cruise-In Show. <http://www.oldiez96.com> Presenting Earle Reed with Honorary Membership in my Rotary Club for the outstanding community work he's done. <http://www.rotarydistrict7150.org/NewHartf.html> Enjoying Mark Russell at a local fundraiser. Creating the first Mohawk Valley Kids Events Calendar for the wonderful Children's Museum <http://www.museum4kids.net>

**WRAPUP:** As I think about all that's going on in our nano-evolving world, I got to thinking about where we've been, where we're going, and what it takes to be a winner – at anything. Records are meant to be broken, and leaders are meant to be challenged. The 5 major traits possessed by winners in any industry, family, or sport are 1.) Perseverance – they simply never give up when the goal is a worthy one; 2.) Hard Work – they possess the willingness to work long hours, sometimes for years, doing whatever it takes to get better at what they're doing; 3.) Leadership – they know what they can do, what they need to learn, and what they need to delegate – and they do so; 4.) Play – not only is their work their play, they take time to daydream and engage in activities that keep the child in them alive and well; 5.) Intuition – they go with their gut, have a psyche with no fear, challenge and embrace the moments.

Have a great rest of the month, thanks for reading, and let me know if we can be of service to you!



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MARLENE'S SERVICES: Marlene & her team help companies stay competitive by understanding and taking action on future trends. Clients have used their services over the past two decades to:

Review or design your Strategic Plan

Evaluate, design, or redesign your Website

Give you articles for your website or newsletter

Help you combine your offline & online marketing

Provide Leadership and/or Sales training for key people

Analyze your competition and industry in this volatile environment

Deliver keynote on Change, Technology, Leadership, Net Commerce

Conduct a Digital Age or E-Business Briefing Session for key executives

Coach people at the top during times of transition to move forward into the future

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