



# The SMB Guide

## How to Digitally Transform Your Business (Checklist)

Evaluate each functional area of your business and identify problems, weaknesses, and opportunities for innovation.

### 1. Human Resources

- a. Revise HR processes to increase efficiency and cut costs.
- b. Our software recommendations:
  - [Gusto](#).
  - [Zenefits](#).
- c. Other software to consider:
  - [Benefits Administration Software](#).
  - [Time and Attendance Software](#).
  - [Recruitment Software](#).
  - [Learning Management Systems](#).

### 2. Payroll

- a. Simplify payroll processing, ensure accuracy, and maintain compliance.
- b. Our software recommendations:
  - [Gusto](#).
  - [Zenefits](#).

### 3. Accounting

- a. Save time and maintain high accuracy in all accounting functions.
- b. Our software recommendations:
  - [FreshBooks](#).
  - [Botkeeper](#).

### 4. Customer Relationship Management

- a. Simplify customer relationship management and enhance customer satisfaction.
- b. Our software recommendations:
  - [HubSpot](#).
  - [Freshsales](#).
- c. Ensure your choice of software is sufficiently user-friendly and can be integrated with your other systems.

### 5. Marketing

- a. Leverage digital marketing tools, cut marketing costs, and attract more customers.
- b. Our software recommendations:
  - [ActiveCampaign](#).
  - [SendInBlue](#).
- c. Other software to consider:
  - [Marketing Automation Software](#).
  - [Email Marketing Services](#).

- [SMS Marketing Software](#).
- [Event Management Software](#).
- [Press Release Distribution Services](#).

## 6. Customer Service

- Deliver excellent customer service in record time.
- Our software recommendations:
  - [Freshdesk](#).
  - [Cayzu](#).
- Other software to consider:
  - [Help Desk Software](#).
  - [Live Chat Software](#).

## 7. E-commerce and In-Store Operations

- Reduce expenses with e-commerce and enhance in-store operations and shopping experiences.
- Our e-commerce software recommendations:
  - [BigCommerce](#).
  - [Shopify](#).
- Our POS system recommendations:
  - [Square](#).
  - [Loyverse](#).
- Our in-store analytics software recommendations:
  - [RetailNext](#).
  - [Inpixon](#).
- Other tools and services to consider:
  - [Mobile Credit Card Readers](#).
  - [Merchant Services](#).
  - [Online Credit Card Processing Companies](#).
  - [Inventory Management Software](#).

## 8. Order Fulfillment

- Gain a competitive advantage by digitizing order fulfillment processes.
- Our software recommendations:
  - [ShipMonk](#).
  - [Shipstation](#).
  - [ShippingEasy](#).

## 9. Operations Management

- Simplify operations management and improve operational efficiency.
- Our enterprise resource planning (ERP) software recommendations:
  - [ePromise ERP](#).
  - [ERPAG](#).
- Other software to consider:
  - [Supply Chain Management Software](#).
  - [Asset Management Software](#).
  - [Project Management Software](#).

## 10. Manufacturing

- a. Achieve maximum production efficiency.
- b. Our software recommendations:
  - [Plex](#).
  - [Evo ERP](#).

## 11. Maintenance Management

- a. Save costs and ensure uninterrupted operations with computerized maintenance management solutions.
- b. Our software recommendations:
  - [UpKeep](#).
  - [Direct Line](#).
  - [eWork Orders](#).

## 12. Employee Enablement

- a. Provide your employees with user-friendly, intuitive tools for efficient teamwork.
- b. Our software recommendations:
  - [Dropbox](#).
  - [DocuWare](#).

## 13. Cloud Services

- a. Improve data security and reduce IT costs.
- b. Our cloud services recommendations:
  - [Amazon S3](#).
  - [Azure Storage](#).
- c. Our database management systems recommendations:
  - [Knack](#).
  - [TeamDesk](#).

## 14. Security

- a. Secure, monitor, and manage your digital framework.
- b. Our cyber security software recommendations:
  - [Kaspersky](#).
  - [Norton](#).
- c. Our mobile device management software recommendations:
  - [Scalefusion](#).
  - [SureMDM](#).
- d. Our network monitoring software recommendations:
  - [Atera](#).
  - [Auvik](#).

## 15. Business Intelligence

- a. Use data analysis to make great business decisions and gain a competitive advantage.
- b. Our software recommendations:
  - [Chartio](#).
  - [InsightSquared](#).
  - [Klipfolio](#).
  - [Dataiku](#).