SMALL BUSINESS TECHNOLOGY GUIDE:
AN ESSENTIAL OVERVIEW

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Small Business TRENDS

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INTRODUCTION

From smartphones to tablets, and cloud software to your website -- the simple fact is most businesses today couldn't survive without technology.

Here at Small Business Trends we wouldn't last more than a day without our tech.

We are in the online publishing business. We rely on a talented team of writers, graphic designers, editors and back office support staff.

But we all work remotely. For collaboration, it's absolutely essential to have the right technology.

For example, Skype is our go-to collaboration app. Our team is on it literally all day long sharing screens and working together as if we were in neighboring cubicles instead of thousands of miles apart. We use Skype for answering short questions via text chat, quick team huddles over voice, and longer strategy meetings via video.

Cloud file storage and backup, as well as a variety of cloud software apps, are all in our toolbox. And when it comes to hardware, most of us use several devices -- sometimes at once! Smartphones, tablets (including my adored Surface), laptops and desktops are all in our arsenal.
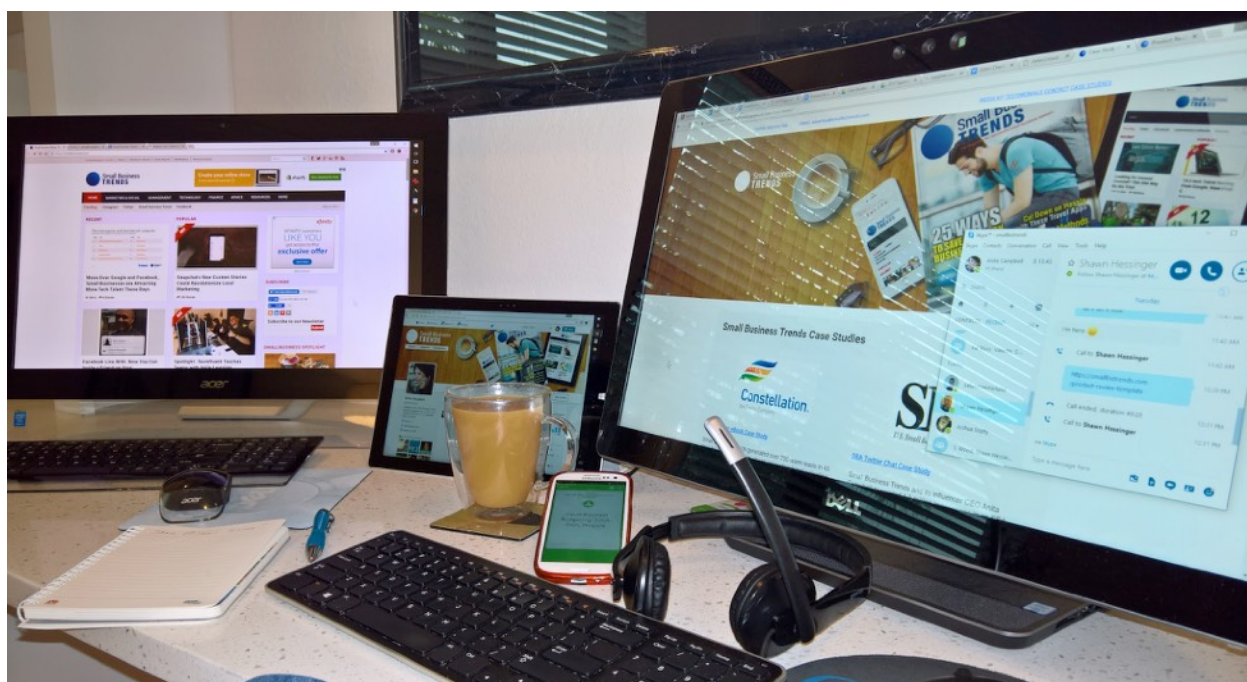
In fact, technology is an essential building block of our business strategy. When we look at scaling to grow or driving more profits, technology is part of our plan.

And that brings me to this ebook. The purpose is to give you the key to unlock the many opportunities technology offers your business. With underwriting help from Microsoft, we were able to invest the time to pull it together in one place. We hope it gives you the grounding to become a tech-empowered business -- just like we are.

P.S. That's a real photo of my desk above.

Anita Campbell
Founder and CEO,
Small Business Trends LLC

ESTABLISH A TECHNOLOGY FOUNDATION

No matter what industry you are in, you will need a solid technology foundation. After all, you couldn't build a house without a foundation. The same goes for building a business.

Your technology foundation will consist of computer hardware that you and your workers use, an operating system environment, and today's must-have mobile devices such as smartphones and tablets for on the go.

CHOOSING YOUR COMPUTERS AND MOBILE DEVICES

There's no one computer or mobile device that's right for every small business.

Technology should be based on your needs, including the type of work you and your employees do and where you'll be doing it:

- ► Those who travel on business, visit on site with customers or work from remote locations may place an emphasis on mobile devices, including smartphones, tablets and laptops.

- ► Those out in the field may require ruggedized devices with tough, impact-resistant casings.

▸ Those who primarily spend their day in the office may rely mostly on desktops, all-in-ones (desktops without a separate CPU tower), 2-in-1s (devices that convert between laptops and tablets) or laptops.

Personal preference also comes into play. Some people simply prefer a certain type of computer or mobile device, perhaps because they are used to the user interface or they prefer the form factor.

Increasingly, employees are more comfortable using their own devices. Many employers are opting to allow this choice -- an option known as "Bring Your Own Device" or BYOD. In a BYOD environment an employer allows employees to log into the company network and software systems using personal devices. This may require special security steps that we discuss more in Part 3.

Today in a small business, you and your workers are likely to have more than one device each. Plan for at least one desktop computer for every employee who works in an office environment. It's not uncommon for small business people to also add a laptop or tablet for those who travel or work outside the office. And of course some workers may need a mobile phone for business. In fact, startups may decide to forego landlines altogether and opt to solely use mobile phones, along with an option like Skype -- at least in the beginning.

MICROSOFT SURFACE PRO: The Surface Pro tablet has an attachable keyboard that snaps on with a touch, transforming it into laptop mode in two seconds. The Surface also can be used for drawing, using what's called "studio mode" and a stylus pen. With its Windows 10 operating environment, it has a powerful CPU and can double as your go-to computer while on business trips or while out of the office.

SPOTLIGHT

The use of multiple monitors is becoming more common. Most desktops, all-in-ones and laptops today have ports to connect an extra monitor. Extra monitors, especially 23 inches or larger, aid efficiency. You'll do less switching back and forth between screens manually, saving you time.

The following chart shows key features and benefits of the main categories of computers and mobile devices available today. You can also use the price ranges to get an idea of how much to budget as you plan to start or expand your business -- or budget for replacements.

DEVICE	PROS AND CONS	TYPICAL PRICE
Desktop	***PRO:*** ▸ Powerful CPU ▸ Can be bolted down and secured ▸ Easy to add multiple monitors for efficiency ***CON:*** ▸ Not portable due to size	$500 to $2,000
Laptop	***PRO:*** ▸ Portable ***CON:*** ▸ May be limited by keyboard size, battery life or computing power	$400 to $1,500
All-In-One	***PRO:*** ▸ Sleek form factor (no separate CPU tower) ▸ Fewer cords - meaning less desktop clutter and fast set up ***CON:*** ▸ May be insufficient for those with powerful computing needs such as video/graphics editors, software developers and gamers	$750 to $2,000
Tablet and 2-in-1	***PRO:*** ▸ Convenient ▸ Lightweight ***CON:*** ▸ May have limited memory and storage ▸ May lack a physical keyboard and/or USB ports	$400 to $1,500
Smartphone	***PRO:*** ▸ Ultra-convenient for work on the go ▸ Can replace landline for business calls ***CON:*** ▸ Limited by small screen size ▸ Hard to type on small touchscreens - limiting usefulness as your main computing device ▸ Data charges can add up quickly unless you have an "unlimited" plan	$200 to $1,000

WINDOWS 10 EDITIONS: Windows 10 comes in two editions of interest to small businesses: "Home" and "Pro." Freelancers, home-based businesses and smaller organizations may do just fine with Windows 10 Home. Other small businesses may need the additional features of Pro or your IT consultant may specify the Pro edition. Here's a comparison of Windows editions.

OPERATING SYSTEM SOFTWARE

All hardware requires operating system software to function.

Your choice of hardware will dictate which operating system you use -- and vice versa. Certain hardware only works with certain operating systems.

The most common computer operating systems for business users today are Windows (Microsoft) and OS X (Apple).

Other computer operating systems exist, but they may be limited to certain purposes or for highly technical users. For example, Linux (open source) is mainly used by those with deep technical knowledge or for servers. The Chrome operating system is limited to a small line of Chromebook devices and may not be compatible with all business software.

Let's break it down into two charts to understand more about the pros and cons of the main operating systems used by small businesses.

OPERATING SYSTEMS FOR COMPUTERS

OPERATING SYSTEM	PROS AND CONS
Windows	‣ Used by over one billion computers. Windows 10 is the current version in 2017. ‣ Has common software that runs on Windows includes the Office Suite of Word, Excel, PowerPoint and Outlook. ‣ Provides wide interoperability to work with clients and partners since many businesses are Windows based.
OS X	‣ Has proprietary system mostly limited to Apple hardware. ‣ Runs industry specific apps, some of which are favored by the graphics and video production industries.

Mobile devices such as smartphones have a different set of operating systems. The main choices for mobile operating systems include Windows, iOS, BlackBerry OS and Android.

OPERATING SYSTEMS FOR MOBILE DEVICES

OPERATING SYSTEM	PROS AND CONS
iOS	▸ Used on iPhone and iPad limited to Apple's ecosystem ▸ Uses a long list of mobile apps
Windows	▸ Works with Windows smartphones, Microsoft Surface tablets, and other tablets from various manufacturers ▸ Provides a familiar Windows 10 operating environment. Chosen by many businesses for interoperability ▸ Mobile phone apps are limited
BlackBerry OS	▸ Has proprietary software limited to BlackBerry devices ▸ Known for enterprise level security; popular with government users ▸ Mobile apps are limited
Android	▸ Runs on Android smartphones and tablets from various manufacturers ▸ Uses a long list of apps with a large open source community of app developers

Always keep operating systems up to date. Install updates and security patches as soon as they are available, or set them to install automatically. Outdated operating systems triple the risk of a data breach, according to a study by BitSight.

FACTORS TO CONSIDER WHEN CHOOSING HARDWARE DEVICES

With thousands of different devices and configurations available on the market today, choosing computer hardware can feel overwhelming. As you're visiting vendor websites and thinking through your choices, consider these factors:

CPU Power, RAM and Storage: The minimum system configuration for your system will depend in part on the type of business you operate. Graphic design, photography, web

development and other fields in the same genre will require more capability than businesses that mainly use computers for email, accounting and similar office functions. At a minimum, business users will want a Core i5 processor, 4GB RAM, and 500GB storage for a computer. If you routinely have many applications open at once or do heavy graphics or video work, consider upgrading to at least 8GB of RAM and 1TB storage, including solid-state drives (SSDs) for faster access.

Monitors: The minimum desktop monitor size these days seems to be around 20 inches. But for a small price uptick you could get a 23" or even a 25" monitor on sale, and significantly increase the screen size available to work on. A bigger screen tends to be more efficient because you do less scrolling. When it comes to desktops, touchscreen monitors are an option and usually a bit more expensive. If you are in design or other creative fields, a touchscreen on your desktop computer may be essential. But for standard office tasks on a desktop PC, you might not need touch.

Laptops: Balance screen size and keyboard size with weight. If you primarily use a laptop for business travel, a 17-inch will have a nice sized screen and keyboard, but could feel like it weighs 50 pounds after you lug it through the airport. A smaller 11", 14" or 15" will be lighter for long-distance travel but may require you to compromise a bit on keyboard and screen size. On the other hand, if you use your laptop everyday in your office, but don't have to carry it long distances, you may want to go for that 17-incher.

Interoperability: What software do you use regularly, and what operating system does it work on? Will your system need to seamlessly bring employees, vendors, partners and customers together? For example, with so many businesses using Microsoft Windows, standardizing on Windows products makes it easy to share documents and files, and provides a common interface.

Mobility: How important is mobility? Do you and other team members travel frequently or visit customers? Will you require lightweight mobile devices such as smartphones or tablets that connect through a wireless carrier because a secure WiFi connection is not available?

Apps: In the case of a mobile device, does it have the apps that you and your employees use frequently?

Cost: Find a balance between price and use case to get the best technology within your budget. Consider financing if you don't have the funds to buy outright. Some retailers offer no-interest financing if paid off within a certain number of months.

Tax Breaks: IRS rules allow U.S. small businesses to write off the price of business computers in the purchase year, rather than depreciating the cost over five years. That's a nice tax incentive. Called a [Section 179 expense](), it's available for all qualifying property up to $500,000 total. Check with your tax adviser for details. You may be able to afford more than you realize, once you take into account the effect deductions have in lowering your taxes.

Today, the size of your business is almost immaterial when it comes to acquiring technology. Affordable technology is available in a wide number of choices, and it is easier to use than ever -- letting you focus on running your business.

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3 PRACTICE TIPS

▶ Don't go overboard on bells and whistles. For most business users, a budget PC or smartphone will do just fine. Remember, you'll likely pay top dollar for the latest hot model. Does your staff really need that one, or will last season's model on sale do the job? Shop for quality and value.

▶ In the past the rule of thumb was to replace computers every five years, but these days some businesses upgrade every two or three years. They know there's a cost to slowness, crashing or freezing.

▶ Sales and discounts can save hundreds of dollars. Plan to take advantage of seasonal sales (Memorial Day sales, back to school sales, etc.). Check industry associations you belong to, as well as vendor websites, to see if they offer member or partner discounts.

EMPOWER EMPLOYEES TO COLLABORATE AND BE PRODUCTIVE

Once you've decided on the proper hardware for your business, next comes the software to allow your employees to communicate, collaborate and perform as a team.

Essentials in most small businesses include software in four main categories:

▸ An office suite

▸ Messaging and communications software

▸ Shared file storage

▸ Project management, collaboration and virtual workspace tools

With proper implementation and usage, your employees will be empowered to unleash new levels of productivity in your company. It's not just office workers who need good tools. Even those who work in a production environment such as a shop floor or retail setting or in the field, may require some or all of the above tools.

Let's break the four categories down into more detail.

THE BASICS: STANDARD OFFICE SOFTWARE

With the following applications in place, you and your employees can carry out basic functions and communicate. These are the essentials every office worker needs:

Documents – A word processor such as Microsoft Word lets you create professional grade documents. The .doc or .docx format is a standard in the business world.

Presentations – Create presentations for meetings, sales proposals and speaking engagements. The PowerPoint .pptx format is a standard.

Spreadsheets – A spreadsheet software will crunch numbers for your business. But they are not just for numbers. Spreadsheet applications also allow you to structure data and import it into and export it out of accounting, email marketing, CRM and other software applications. The .xls format is a standard in the business world.

OFFICE 365: Office 365 brings an office suite and collaboration software together under one cloud platform. For a modest monthly fee, Office 365 allows a small business to stay up and running, and collaborate remotely, with access to compose, edit and share Word, Excel and other documents from anywhere employees happen to be through their Internet browser or mobile device.

SPOTLIGHT

Email – Email is essential today, replacing physical mail for many purposes.

Calendars – Today's cloud-based calendars like Outlook allow you to send invitations and set appointments with others outside your organization, too.

Contacts – This is where you keep track of contact details such as email, phone numbers and addresses in an electronic Rolodex. A good email program automatically assembles this data as you email others. You can then add additional details to each contact manually.

Look for an office suite that syncs across all your devices and touchpoints. That way important information will always be at hand and up to date, no matter which device you use.

MESSAGING AND CONFERENCING APPS: COMMUNICATING WITH EASE

Messaging through text chat, and audio and video conferencing, are now a bonafide business communication category.

SPOTLIGHT

SKYPE: Skype is a tool used by hundreds of millions of people to communicate via text, voice and/or video chats. You can also collaborate by sharing screens and files. Skype is great for teams to use internally, but is also excellent for your team to chat with others outside your company. It is free to talk with other Skype users. But by paying a small amount (varies by country), you can also make outbound calls to regular phone numbers or get a Skype number in order to receive inbound calls from phone users.

Skype is an example of a messaging app that combines text chat, along with audio and video conferencing and screen sharing. With hundreds of millions of monthly users, Skype has become nearly ubiquitous -- and it's free. So it's a good starting point for small businesses.

There's also Skype for Business, a separate application used by businesses of all sizes. Skype for Business integrates with Office 365, enabling you to initiate communication with contacts directly from within Office 365.

Other types of messaging apps include screen sharing applications, audio conferencing bridges, and live chat for customer support. Even social media sites now have messaging apps, such as Facebook Messenger.

With messaging apps, your team members can interact with each other and with customers and sales prospects, almost instantly without the back and forth wait of email or playing phone tag.

By collaborating over messaging or conferencing, you may be able to negate the need to travel and save money as a result. The market is flooded with messaging and conferencing apps, so choose a brand you trust and standardize it throughout your company. It also helps if it integrates with other software you use.

SHARED FILES AND STORAGE — KEEPING TRACK OF VALUABLE BUSINESS FILES

As a small business, one of the best IT investments you can make is in cloud file storage. That is because it does much more than the name suggests.

A good cloud storage app provides file sharing, team collaboration, syncing files across devices, data backup and even disaster recovery. And a good storage app keeps your files secure at a reasonable cost. One popular choice is Microsoft OneDrive, which comes integrated with Windows 10. Other choices include Dropbox, Apple iCloud, Box or Google Drive, among others.

Choose a solution that saves and stores new files and changed files automatically, without manual intervention.

BENEFITS OF CLOUD-BASED SOFTWARE AND STORAGE	
Accessibility	‣ Files can be remotely accessed, anywhere -- anytime.
Collaboration	‣ Uses the power of technology to keep everyone on the same page.
Freedom	‣ Device independence: supports a Bring Your Own Device ("BYOD") environment and allows use of many device platforms.
Security	‣ Office 365 considered even more secure than on-premise software. Microsoft is the first major cloud provider to adopt the first international cloud privacy standard developed by the International Organization for Standardization (ISO).

PROJECT MANAGEMENT AND VIRTUAL WORKSPACES — COLLABORATING TO ACHIEVE GOALS

A project management application goes beyond to-do lists to help everyone in your company remain on target at all times. Everyone on your team can collaborate on projects and be in the loop. Examples of project management applications include Asana, Basecamp and Zoho Projects, as well as Microsoft Project.

Examine company goals, and make sure you actually need a project management application. For example, a startup may not need a full-blown project management app in the first year, until it starts to grow. At first it may be simpler to use calendar reminders and a to-do list. For

example, Microsoft To-Do is a cloud app that integrates with Office 365 to assemble and prioritize a to-do list, and have it available no matter what device you use.

Today's project management solutions do more than assemble gantt charts and track milestones. They also incorporate collaboration and messaging features to keep conversations organized -- operating as virtual workspaces. One popular example is Slack, but Microsoft recently introduced a version integrate with Microsoft products, called Microsoft Teams.

OneNote is a digital notebook that will give those in your small business the ability to assemble a variety of different text materials, images, audio and video in one place and share it -- great for pulling together a lot of information. You can also use OneNote to sketch and draw diagrams -- great for brainstorming sessions.

MICROSOFT TEAMS: Microsoft Teams places your entire team, their projects and conversations in one place. Easily accessible within Office 365, Teams allows your group to communicate, collaborate and share information with deep integration of Skype.

SPOTLIGHT

3 PRACTICE TIPS

▶ Make sure any solutions will scale as your business grows. Look for the ability to add users, extra storage capacity and advanced features to meet new needs, all cost effectively and seamlessly without headaches.

▶ Choose software apps that can be used with various hardware devices -- desktop, tablets and smartphones alike. Today's employees like to bring their own devices ("BYOD"), and may want to log in and do work using their own iPad on your system, for example.

▶ Consider needed integrations with other critical software you use. Software that integrates together helps you avoid data buried in silos or that requires inefficient manual entry from one system to another. Widely-used software apps tend to integrate with a lot of other apps, whereas less popular apps may require you to hire tech help to build your own integration with other systems.

PROTECT YOUR BUSINESS THROUGH SECURITY AND BACKUPS

You may think you're okay without cyber security and backup systems -- until it's too late. Companies that operate without a security protocol in place are living on borrowed time.

Security breaches are more common than most owners realize. The statistics are alarming and small businesses are one of the biggest targets. Over the past three years, phishing email scams alone have targeted more than 400 businesses a day and cost more than $3 billion over the same period, cyber security firm Symantec reports.

TYPES OF ATTACKS AND DEFENSES AGAINST THEM

The most common attacks have user error as their starting point, but many circumstances can lead to systems being breached and data lost:

▸ **Insecure passwords:** Hackers may breach through guessing or using other methods to crack passwords. Passwords that do not incorporate a combination of letters, numbers and other characters or those that are used on several different platforms are always less secure.

▸ **Loss or theft of mobile device or laptop:** A lost or stolen mobile device or laptop without adequate security to prevent access is an open invitation to cyber criminals.

▸ **Clicking on phishing links in emails:** Clicking on emails from unknown senders -- including those made to appear to be from a colleague or a partner -- can open you to attack or allow your login credentials to be harvested without your knowledge.

▸ **Viruses:** These are pieces of code specifically created either to hamper the operations on your laptops, PCs, tablets and phones or to use them in an attack on other systems.

▸ **Malware:** This software is specifically designed to disable an individual device or an entire computer system, possibly until your company pays a ransom.

▸ **Natural Disasters:** When a natural disaster takes place in the vicinity of your business or of a technology provider, it can cause data loss and interruption of your business continuity. According to FEMA, about 40% of businesses never re-open after a disaster.

SECURITY PROTOCOLS

Fortunately, there are solutions to protect your business. But you **MUST be proactive at all times.** The following table outlines various security protocols and protective measures you should put into place.

PROTOCOL TYPE	WHAT THEY PROTECT AGAINST
Malware Security and Scanning	System monitoring to identify and neutralize malicious malware and viruses.
Antivirus	Defensive protection against viruses, malware and spyware. Windows Defender is built into Windows 10 and enabled automatically, with no subscription necessary.
Device Locking	Remote locking of misplaced or stolen devices, so unauthorized people cannot gain access to data.
Passwords and PINs	Codes that protect from unauthorized entry into a device or software account.
Password Alternatives: · **Biometrics** · **Hello**	Using human characteristics for authorization to access a device or system: · Facial Recognition · Iris Detection · Fingerprint · Voice
Two-Factor Authentication, 2FA	Additional layer of security that combines sources of verification: · Something the user knows (Password, PIN…) · Something the user has (Mobile device, USB…)
Location Tracking	Real-time global positioning and GPS to help locate and recover your lost or stolen device.
Remote Wiping	Ability to remove ("wipe") all data from a lost or stolen device
Administrative Control & Employee Access Levels	Authorizations limiting access to specific individuals, based on roles and responsibilities.
Browser Choice	A simple and effective measure to minimize risk. Choose a browser, such as Microsoft Edge, which has been independently tested and recognized as secure.

It takes resources and a lot of hard work to build your customer base, contacts, documents and strategies. Take the extra steps to protect them.

FILE BACKUPS

You can't underestimate the value of backing up your data. Sooner or later you may need to restore your data -- and that backup could be your lifeline.

Ironically enough, if not handled correctly, file backups can become the weak point in your business structure. Improper setup, storage and management of your files can lead to vulnerabilities. For example, relying on manual action to run backups can lead to lost data if someone forgets. Or an insecure backup system can be hacked into.

THE ADVANTAGES OF CLOUD SOLUTIONS

The cloud has been mentioned previously as a sharing tool, but one of its main strengths is as a secure backup and storage solution.

SPOTLIGHT

AZURE: Azure is a secure cloud computing platform. It consists of an integrated collection of cloud services. Included are tools to build apps, database tools and advanced analytics. Businesses can use it as a platform to create their own business applications and deploy them. Because you are charged only for the services and tools you choose, it is affordable for small businesses.

The cloud is currently the most effective and flexible solution in terms of storage, making it the best option for backing up your business data. Microsoft OneDrive can enable automatic saving and backup of all your company's documents and other user files. And when the cloud is merged with a service-driven platform such as Azure, the options are expanded.

The same versatility the cloud offers in terms of productivity and collaboration can be seen in terms of cloud security. Your data is backed-up and securely stored yet users can instantly access it. With a good and powerful cloud backup solution, not only can you get data backup, but you also can achieve encryption, site recovery and monitoring -- along with file storage accessible by users no matter where they are located.

COMPARISON OF BACKUP OPTIONS

Other backup options also exist including external disks and hard drives. The following table highlights the pros and cons of three commonly-used type of backup solutions for small businesses.

BACKUP TYPE	PROS	CONS
CDs, DVDs & Disks	‣ Convenient ‣ Portable ‣ Low Cost	‣ Limited storage space ‣ Limited remote access ‣ Subject to loss ‣ Subject to theft
Thumb Drive	‣ Convenient ‣ Portable ‣ Flexible Size	‣ Subject to loss ‣ Subject to theft ‣ Limited remote access ‣ Manual syncing required
The Cloud	‣ Secure ‣ Convenient ‣ Remote Access	‣ Bandwidth usage ‣ No offline access

The best backup option will depend on your particular situation, your priorities and the actual type of data. A few photos shot for a brochure or web design project and in frequent rotation around the office may do fine on a thumb drive. Your complete accounting records may not.

PUBLIC WIFI AND REMOTE ACCESS

While it may be convenient to access your data and work remotely from the coffee shop or an airport, it's important to understand that convenience brings risks. Potentially big risks.

In general, you will want to keep the following tips in mind when using public computers and WiFi connections.

‣ Use a VPN (virtual private network) to access your company systems remotely. VPNs provide added security when using a public WiFi network. VPNs are a bit technical, but with the capability now built into Windows 10, setting one up is easier than ever. Either contact your IT support person, or if you don't have one, see instructions for setting up a VPN in Windows 10.

‣ If you don't yet have a VPN, avoid the public WiFi networks altogether and use your own mobile hotspot you've previously arranged through your mobile carrier.

- No matter what, never enter any financial or sensitive information over an open public WiFi network, as your data transfer may be "eavesdropped."

- When using a public computer, turn off any sharing features in bluetooth and elsewhere that you may use when at your home office.

- Use a secure browser such as [Microsoft Edge](#).

- Choose "private mode" or "incognito" in your browser so that cookies and temporary files are not saved on a public computer when you're done.

- Always log out and close the browser when finished, if using a public computer such as in a hotel lobby.

Establishing security protocols may seem labor intensive. But once systems are in place, the management is straightforward and the benefit-to-risk ratio will be in your favor.

The greatest benefit from adopting security protocols is that you will have the freedom and security to focus on what matters most -- running your business.

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3 PRACTICE TIPS

▶ Enforce a strong password policy. Be sure that team members are using passwords that are not easily guessed and are not using the same passwords on multiple platforms. Don't make it easy on hackers using "password" or "12345" as your password! Consider biometric logins, especially for mobile devices.

▶ Educate employees. Be sure they understand what risks are out there, and how to avoid malware, phishing and other attacks aimed at gaining access to your company's system through them. An unknowledgeable worker is a cyber risk for your business.

▶ Practice security and backup protocols. Make sure company and staff computers are running the latest versions of software, including operating system software, to avoid vulnerabilities. Be sure to have automatic backup protocols in place to protect company data. Monitor networks and systems for security vulnerabilities.

OPERATE YOUR BUSINESS BACKEND EFFICIENTLY AND PROFITABLY

Technology can help your business:

▸ Drive efficiency that results in faster order-to-cash cycles

▸ Cut costs

▸ Automate repetitive tasks to free up staff for higher level contributions

▸ Satisfy customers better by avoiding mistakes and responding faster

With all that time and effort saved, your company can go after more and better opportunities.

THE DOLLARS AND CENTS OF BACKEND EFFICIENCY

Let's look at one example of how backend efficiency leads to better bottom line results.

Let's say your company currently has a staff of customer support personnel who answer the phone and emails, and respond to each customer inquiry individually. But sometimes customers end up on hold for a long time, and may be unhappy.

But then your company decides to adopt a new help-desk software. The software sends out automated responses to customer inquiries along with links to FAQs and Support How-to documents and videos. With the help of a chatbot integrated into a help desk and live chat

solution, it looks like an employee is conversationally responding to each inquiry, so it doesn't feel impersonal. Customers like it because answers are fast. They get the right information they need most of the time.

This automation addresses 50 percent of the most common customer inquiries. In turn it frees up one employee who previously handled this work manually, to find time to support a new marketing project. The new project results in growth of your sales and resulting profits by 12 percent -- without adding an extra employee. In other words by implementing technology, you dropped profits to your bottom line.

The above example may not necessarily work for every company. But by analyzing your backend activities, especially the most costly or labor intensive, you may be able to automate and streamline some other task, given the right technology solution. And you can achieve measurable results in the process.

MICROSOFT BOT FRAMEWORK: With the Bot Framework development tools, you can build and connect a chatbot for Skype, Office 365 mail, Facebook Messenger or elsewhere to interact intelligently with your customers and users.

SPOTLIGHT

The following table describes some common categories of backend efficiency software. If you're not already using these in your business, consider trying them out.

CATEGORY	DESCRIPTION
Planning and forecasting	With enterprise resource planning (ERP) software, businesses can integrate apps to automate and manage their organization. This includes back office functions in HR, services and technology. Dynamics 365 is one example.
Accounting	Accounting software helps you organize your bookkeeping, including revenue and expenses. With good accounting software, you can also be well organized at tax time. Commonly used accounting software for small businesses includes QuickBooks, FreshBooks, Xero and Zoho Books.
Invoicing Apps	Those that send invoices have a choice today of dozens of cloud-based solutions that enable you to create invoices electronically. Some even incorporate "pay here" buttons to enable payment electronically via credit card or PayPal.

CATEGORY	DESCRIPTION
Payment Solutions and Merchant Accounts	These are solutions designed to accept cashless payments for your business. Depending on the solution, you may be able to accept payments online, in person with the help of a credit card swipe device, or with contactless payment readers that allow people to pay with their phones. Common solutions include PayPal, Square, Stripe, Authorize.net and Apple Pay. Banks also offer merchant accounts and proprietary payment tech products.
Point of Sale Systems (POS)	Think of POS systems as digital cash registers. Traditionally, POS systems have included turnkey hardware that looked like a cash register. But today's POS systems are getting more compact. Some are little more than mobile apps with a credit card swipe device you can attach to a tablet or phone. POS systems are used not only at brick and mortar locations, but also for craft shows and consumer in-home sales. Examples include Clover POS, Square Up POS, Vend and POS Nation.
Payroll	Payroll solutions may be full service -- or may consist of cloud software that enables you to run payroll, calculate tax withholding and print paychecks. Examples include QuickBooks Payroll, Paychex, and Run by ADP
Help desk	This software can organize and streamline the process of handling customer service requests. Today's help desk software is likely to be cloud based and cover ticket management, FAQs, a knowledge base of common topics, and sometimes live chat. Examples include Zoho Desk, Zendesk, Freshdesk, and Groove Helpdesk.
Analytics and data intelligence	Business intelligence software presents data gathered from business operations in a way that helps managers make informed decisions. Examples include PowerBI, Looker and Tableau
Shipping and postage	In addition to delivering packages, USPS, UPS, and FedEx all offer a combination of software and online services to streamline your shipping processes, saving you time and money. They can even integrate into your e-commerce store.

CHECKLIST FOR CHOOSING SOFTWARE AND VENDORS

When choosing software for backend productivity and efficiency, look for these features and factors:

▸ Software and apps that have small business testimonials and a long list of positive reviews.

▸ A provider with a cancel anytime policy, or one that allows you to pay month to month. As a small business you can't afford to be locked into a new provider, in case it doesn't work out.

▸ A financially strong provider with a track record of good security practices.

▸ Practical, easy-to-use features instead of a complex package, especially if it's your first time using a particular type of software.

▸ The ability to seamlessly upgrade later on, for expanded functionality from the same vendor.

▸ Software that comes already integrated into other software you use, or that offers easy steps to integrate with commonly-used software packages. Try to avoid having to develop custom integrations, as that can get expensive and time consuming.

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3 PRACTICE TIPS

▸ Whenever possible, choose cloud-based productivity software for anytime / anyplace access and automated updates and saving.

▸ Ensure interoperability so your key systems work together and "talk" to each other. Avoid having to re-enter the same data into multiple systems or manually download data from one system and upload it into a different software package. After all, the technology should work for you, not the other way around.

▸ Take advantage of free trials to make sure systems are a good fit for your team. Free trials give you time to evaluable how easy a solution is to use, and whether the features really deliver what you need.

MARKET, DEVELOP LEADS AND MAKE SALES

Technology can do much more than help your back office and keep data secure (although that's very important).

Technology also has the power to help you increase your sales.

Today, there are whole categories of software focused on assisting with various types of marketing, lead generation and sales flow.

In the chart below are some of the key categories of software you can use to let the world know about your business, develop leads, manage sales and bring you closer to your customers.

CATEGORY	DESCRIPTION
Customer relationship management (CRM)	With a CRM, you can manage and analyze the entire customer journey so you can improve the business relationships you have with your customers. A good CRM collects all the interactions with your customers across channels and touchpoints so you can increase retention rates and drive sales growth. There are literally dozens of CRM systems today.
Email marketing	Email marketing involves emailing different types of marketing messages and updates to customers and other subscribers. It's become a key technique in small businesses. Commonly-used solutions by small businesses include: MailChimp, Adobe Campaign, Constant Contact, Vertical Response and Aweber.

CATEGORY	DESCRIPTION
Marketing automation	With marketing automation, many of the repetitive tasks in social media, on websites, in email, and in the marketing department have been eliminated or streamlined. At the same time, small businesses can do more personalized selling and follow-up than ever before, due to the power of data analysis and technology. Commonly-used solutions by small businesses include: Infusionsoft, Marketo, Hubspot.
Social media management software	Social media management software helps streamline use of social media in your small business and leverage social media's full potential. It can organize and decrease time spent on social media, and give you valuable analytics to assess your progress. Brands typically used by small businesses include: HootSuite, Zoho Social, Sprout Social, Buffer, Co-Schedule, SocialOomph.
Landing page builders	Landing pages are designed to deliver a call to action. These calls to actions could encourage a customer to buy a product or be added to an email list. Landing page builders help a business get started. Commonly-used solutions include: Leadpages, Unbounce, Instapage, and Optimizely
SEO tools	SEO ("search engine optimization") tools can help you improve your position in and market via the search engines. Some tools used by small businesses include: Surefire Social, Yoast SEO Plugin for WordPress, SEMRush, Moz, Google Analytics, Arefs.
Design tools	Images today are more important than ever in marketing, and graphics and design solutions can help you create ones that are uniquely yours. For instance, you can use a design tool to make social media sharing images. Tools commonly used by small businesses include Canva, Adobe, Fotor and PicMonkey.
Miscellaneous	Other types of marketing tools include press release services, survey services, live chat and booking software. The types of tools are nearly endless. Here are some commonly used solutions: Placefull, Microsoft Bookings, Booker, SurveyMonkey, Zoho Survey, PR News, Help A Reporter Out (HARO), PureChat, LiveChat and Zoho SalesIQ.

DYNAMICS 365: Dynamics 365 is a cloud-based CRM and ERP (enterprise resource planning) system bringing together customer relationship management, accounting, manufacturing and project management under one system. The exact features and functionality depend on which plan you choose. The Business Edition is scaled for small businesses. It can be managed from the Office 365 dashboard.

SCALE TO YOUR NEEDS

Don't always choose software with the most bells and whistles. While it may be tempting to bring in the "big guns," you also will be getting added complexity your business may not be ready to digest.

Your marketing and sales may not need all those features yet, either. If your business is a startup or still relatively small, choose a solution right-sized for your business's stage of growth.

For example, if you're just getting your company's sales efforts organized and it's only you or perhaps one or two others working on sales and marketing, you may not need a full-featured CRM yet. Instead, you might be better off working through your email inboxes -- with an assist.

SELLING ONLINE – ECOMMERCE

Electronic commerce or eCommerce is the exchange of goods and services over the internet. Small businesses today sell a diverse range of items and services:

- ▸ Handmade crafts
- ▸ Antiques
- ▸ Consumer retail items
- ▸ Unusual niche products
- ▸ Stock images and video clips
- ▸ eBooks
- ▸ Graphic design services
- ▸ Professional consulting services
- ▸ And much much more

OUTLOOK CUSTOMER SERVICE MANAGEMENT: The Outlook Customer Service Management module is a tool that can be added to Office 365. The tool allows you to view all ongoing customer interactions from your inbox. It allows you to take advantage of existing Microsoft Office tools in dealing with customers, but organizes all customer-related meetings, emails and calls for ready action and follow up.

SPOTLIGHT

Selling online begins with premium products, either your own or ones you select to sell. You'll have to create high-quality images and excellent descriptions -- because remember, the online experience has to substitute for the buyer seeing items in person.

Then you'll need an online storefront that allows users to seamlessly navigate from one page to another, to browse and shop digitally. This should include a pleasant checkout experience, along with immediate sales tax calculation and shipping options.

Don't forget fulfillment arrangements, and a clearly stated return policy or professional service conditions. In addition, be prepared to handle customer service inquiries, either through phone, live chat or email.

On top of that, your store has to be mobile friendly, as more and more shopping today is through mobile devices. By the end of 2018, nearly 27% of all U.S. eCommerce sales will be done on mobile devices, according to one study.

It's also possible to sell items from marketplace sites and in a more limited fashion, from social media sites. We explore these options in the next section.

ECOMMERCE OPTIONS

The great thing about digital technology is you have options -- a lot of options. It used to be that the main way to launch an eCommerce store was to build and host your own storefront, using a software package you licensed. However, you'd have to assemble and configure all other elements including a shopping cart and payment gateway, tax and shipping calculation software, and hosting. And you'd be responsible for maintaining all the technology to keep your store running.

Building a storefront "from scratch" this way is becoming less common. Today, many small biz ecommerce stores are hosted in the cloud for you. This means the eCommerce vendor handles all the backend tech, including software and PCI (credit card transaction) compliance, as well as security against hackers. And the vendor hosts the store so you don't have to arrange separate hosting. You can be up and running on a hosted storefront in a very short time -- often not more than the few hours it takes to load some images and product descriptions. Some even allow you to sell online in multiple places, such as by putting a storefront on your Facebook page as well as your own URL, but with centralized inventory and order management. You get all that for a monthly or annual fee.

You have other options today, too, including foregoing your own store. Instead you can sell from a large marketplace site such as eBay or Amazon.

Following is a chart with options for launching an eCommerce store or simply selling one or a few items (or even services) online.

ECOMMERCE OPTION	DESCRIPTION	PROS AND CONS
Building and Hosting Your Own Storefront	You can create your own eCommerce store using software such as osCommerce, OpenCart and PinnacleCart. Or you could add WooCommerce to a WordPress site.	**Pros:** ‣ You have full control ‣ Some software is open source, i.e. free **Cons:** ‣ You are responsible for PCI compliance, hosting and security ‣ More work to set up, customize the design and maintain the store
Hosted eCommerce Solutions	"Hosted" eCommerce solutions are cloud based and becoming the norm today. You simply set up an account online to launch a store, add your product information and tailor the look and feel of the store to suit your brand. Some options popular with small businesses include: Shopify, BigCommerce, Meylah, Big Cartel, Wix Commerce, Volusion, LemonStand.	**Pros:** ‣ Convenient ‣ Fast to set up ‣ Security, PCI compliance and technology is handled for you **Cons:** ‣ Customization may be limited. ‣ If you switch vendors, you can't take your storefront with you.
Marketplaces	Marketplaces are huge sites like Amazon, Etsy, eBay and Handmade at Amazon (for selling crafts and handmade items) that allow individual sellers. There are also a range of speciality marketplaces including Kobo, Barnes & Noble and Amazon Kindle for selling ebooks, as well as stock image marketplaces like iStockphoto and Shutterstock for photographers to sell their images. There are also marketplaces for selling services including Fiverr, Freelancer, Thumbtack and UpWork. There are even sites for consumer services, such as HomeAdvisor and porch.com.	**Pros:** ‣ Huge customer base to tap into ‣ Security and technology are handled for you **Cons:** ‣ Subject to the rules of the marketplace ‣ Lots of competition ‣ Limited brand visibility and control

ECOMMERCE OPTION	DESCRIPTION	PROS AND CONS
eCommerce Add-ons	PayPal is an option for those who want to add a simple shopping cart to their site. There are also plugins and APIs to enable you to add payment buttons using Stripe and Square on a page in existing sites such as WordPress, Drupal and Joomla.	**Pros:** ‣ Low cost ‣ Only one site to worry about **Cons:** ‣ Some add-ons don't scale well and are best for selling a small number of items ‣ While some solutions are easy to implement, others may require technical help.
Social Selling	Some solutions enable you to also place a storefront or individual items for sale on social media sites. Mostly this means Facebook, but you can do some degree of social selling on Pinterest, Instagram and elsewhere. Tools that lend themselves easily to social selling include: ECWid, Shopify, StoreYa. There is also social selling functionality built into some social media sites: Pinterest Buyable Pins and Instagram Buy Now buttons.	**Pros:** ‣ Monetize your social following **Cons:** ‣ Social selling is not well developed on all social media sites ‣ Followers may be irritated with sales pitches

3 PRACTICE TIPS

‣ Seek out marketing and sales tools that other small businesses use. When evaluating vendors, check their websites to see if they refer to serving small businesses and have testimonials from small business owners. Some tools are better suited for large enterprise businesses and may be too complex for your business.

‣ Be crystal clear on your target customers and your business model -- before you shop for solutions. It's easy to become confused with the thousands of tools out there today. Once you know who you're trying to attract and how, then search for the solution best designed to meet the needs you've identified. If you start out with a vague idea of what you're trying to accomplish, you could waste time with the wrong tool.

‣ Hire and train marketing staff who are part marketers, part tech lovers. Marketing today, in particular online marketing, is dependent in large part on being able to leverage software tools, search engines and social media sites. You want people on your team who are not intimidated by technology. Hire employees who embrace tech.

ESTABLISH A WEB PRESENCE

There are 7.3 billion people in the world today -- and 1.2 billion websites. That equates to about one website for every six people in the world!

With that kind of competition, you have to work smart as a small business to make your Web presence stand out. Luckily, today there are a multitude of inexpensive tools to help.

START WITH SECURING A DOMAIN NAME

Your domain name, or URL, is your address on the Web so that customers, prospects and the public can find you.

A domain name is also important so that you can have "branded" email. A branded email address incorporating your own domain name looks more professional and builds trust with customers. An example of branded email would be "joe@ZylonicDesigns.com" instead of "joezd32864@aol.com."

If you don't have a domain name yet, go to any registrar such as [NameCheap](#), [GoDaddy](#) or [Verisign](#), to search for an available domain name and register it for your business. Here is a checklist of factors to consider:

- Check to see if the proposed name is available across the top level extensions you want to use it under. Typically business owners in the United States will check the ".com" extension. Businesses in other countries will likely check the main extension for their country, such as .ca, .co.uk and so on.

- Try to match the root domain to your company name. If your company is Zylonic Designs, choose something like "ZylonicDesigns.com" for your domain name.

- If you can't match your company name, or choose to go with a different style of name, make sure the domain you choose doesn't spell out something offensive or embarrassing. Or lend itself to misspellings.

- Check in search engines to see if the domain name is being used as a company or product name elsewhere, as this might lead to a dispute later on.

- If the name you want isn't available, use the registrar's tools to search for alternatives. Some registrars have advanced suggestion tools that are awesome.

Once you settle on a domain name, register it for several years -- or as long as you can get. Be sure also to choose "auto renew" and fill in your contact information. That helps avoid the disaster of losing your domain name by failing to renew it. (It's happened!)

You might also want to check other common extensions such as .net, .co and .org and secure those, too, for defensive purposes, to prevent others from profiting off your brand by using the same URL just with a different extension. However, don't go overboard and try to secure every possible extension. It could become expensive.

NEXT STOP: A WEBSITE

A website is your place of business on the internet. And simply by being on the internet, you give your business the opportunity to grow.

But some business owners may still ask the question, "Does my business really need a website?"

The answer in most cases is yes. A website brings many advantages that are hard to beat:

- Gives credibility - customers WILL check you out by searching for your website. Today, small businesses without websites may seem like they are not "real" businesses.

- Works for you 24/7. People today research purchases at all hours online, weekends included. Your website provides information even when your business is closed.

- Offers a place to collect leads. With a call to action ("click here" or "download now") and a free whitepaper or ebook, along with a lead form to capture contact information, you can collect sales leads to follow up by phone or email. This is ideal for B2B businesses that sell consulting, services or software to other businesses.

- Gives you a storefront to sell online, if you set it up for eCommerce.

- Provides a home for building a mailing list -- important for your ongoing marketing efforts.

- Provides a home for customer support materials including FAQs and support tickets.

- Allows customers to self-schedule appointments, if you connect a booking app.

- Is a way for people to find how to visit your brick and mortar business, or contact you.

- Well-optimized pages in your website can attract new customers through search engines.

Despite these advantages, some businesses may opt instead to have a presence on a large marketplace site like Etsy or HomeAdvisor, or use their Facebook Page in lieu of a website. However, keep in mind that you are subject to the rules of these large marketplace and social sites. If they change the rules, your business may be negatively impacted. Therefore, even if a big part of your marketing strategy is to leverage marketplaces or sites like Facebook, it's still wise to have a website of your own.

TWO APPROACHES TO GET A WEBSITE

There are two ways to get a website up. You can have someone build a custom website for you, or you can use a DIY website builder tool such as Wix, Squarespace, Weebly or GoDaddy Websites. The following table explains the pros and cons of each approach:

DIY WEBSITE BUILDER TOOLS

POSITIVES	NEGATIVES
Inexpensive (typical range: free to $30 per month)	Customization options limited
Fast to launch (typical: a few hours)	Don't own your website design; if you switch website providers, must start over
Hosting included	"Free" plans may include ads, other limitations (removable if you upgrade)
Security handled by website provider	Use of advanced marketing tools and advanced SEO may be limited
Professional designs	Support often limited to online help; telephone support may be available if you upgrade or pay extra
Industry templates with sample verbiage, images	While easy, the DIY approach takes some of your time
Easy to use - some tools as easy as "drag & drop"	
Update content on your own - no delays, no cost	
Basic SEO and traffic analytics included	
Use own domain name (may cost a bit extra)	

CUSTOM WEBSITE

POSITIVES	NEGATIVES
Full design customization possible	More expensive than DIY (typical: $2,000 & up)
Personal set-up attention - someone to talk to and everything is done for you	Ongoing expenses to operate site: hosting, updating, support requests
Personalized support by someone you know and trust	Longer time to launch (typical: one month or more)
Use any advanced marketing tools and add-ons you wish -- not limited to tool provider's choices	Must communicate your needs from scratch to your designer - can be overwhelming if your first website
Use own domain name	Security is your responsibility (including disruption from / clean up of hacked website)
You own the design (if contract so states)	Takes time to find, evaluate and hire a web designer
	Must draft / review designer contract documentation

BLOGS

Blogs are a great way to set your business apart from your competition by providing educational information for shoppers researching purchases. According to the Pew Center, about 50% of U.S. adults check online before buying.

Plus you can get search engine and traffic benefits from a blog that is part of your website. Companies with blogs get three to four times the traffic to their websites as those that don't, according to Hubspot.

Here are some pros and cons of a blog:

BLOG PROS	BLOG CONS
Establishes you as an authority and thought leader.	Blogs take time to write.
Provides content to "feed" search engines which in turn attracts search traffic. When posts properly incorporate keywords a blog can become a meaningful traffic generator.	If you don't have the time, you may have to hire writing help.
Humanizes your company, because you can speak to customers in a conversational way and engage with them through comments.	If you don't establish clear goals about subject matter, you risk getting off topic. Then the blog won't deliver business results.
Establishes credibility.	
Provides a source of content for you and others to share on social media.	
Provides a source of content for your email newsletter, and thereby helps you grow your mailing list.	

Sometimes business blogs get off topic. This can be avoided by creating a clear list of topics you plan to write about. Follow these two rules for beginners:

▸ Always write about the questions you think potential customers want answered. What problems are they trying to solve that your product or service can help with? Address those items in informative -- not overly salesy -- blog posts. Stick to one topic per blog post.

▸ In your content, incorporate relevant keywords (i.e., search words or phrases that potential customers might use to hunt for a product or service like yours). Choose one keyword phrase per blog post, and incorporate the phrase a few times in a natural way in the text. This helps optimize your page for search engines and increases the likelihood that someone searching will find your blog post -- and your site.

LOCAL LISTINGS

Business listings are a critical Web strategy for local businesses (i.e. businesses that get most of their customers within about a 50-mile radius). That's because consumers often see listing information at the top of the search results when searching in maps and on mobile devices. This data also shows up in standard searches. In fact, consumers may well start their search for a vendor or service by going to a search engine or listing site first.

Listing sites include review sites like Yelp and TripAdvisor, yellow pages sites, business directories like Merchant Circle, BBB, and other places where consumers look. If your information on such sites is incomplete or inaccurate, you could be missing out on new customers.

Listing information can include hours, address(es), phone number, food menus, products and services, website link, logo and pictures (very important these days!). It may also include consumer reviews.

Did you know you could claim your listings and actively manage how your business appears? Start with managing your local listing in Bing through the [Bing Places for Business](#) service, and in Google through the [Google My Business](#) service. Both are free. Since many consumers' searches begin in a search engine, learning to leverage the features of these two services will pay off.

Also consider [Apple Maps](#) and [Facebook Places](#).

But don't neglect other local listing sites -- there are literally hundreds. You might want to take advantage of a listings management tool. Tools like [Yext](#), [AdviceLocal](#), [Synup](#) and [Moz Local](#) have free checkers so you can instantly check to see whether your listing appears on various sites. The tools also allow you to update your information in one dashboard, and propagate consistent up-to-date data across multiple listing sites. Most listing tools require a paid subscription (only the checker is free), but they may be worth it to local businesses.

Local listings are mainly of importance to local businesses that serve consumers at a brick and mortar location.

But what if you run an Internet business, B2B business, or don't receive customers at your location? You still may want to leverage non-local listing sites such as Supplier Connection or vertical industry or association directories relevant to your business.

ONLINE REVIEWS AND REPUTATION

For businesses where reviews are crucial (e.g. restaurants, hotels, cafes, bars, home improvement, and other consumer products and services), it's essential to stay abreast of reviews. Failing to address bad ones could cost you in sales and reputation.

However, monitoring all of your reviews can be a job in itself. You may wish to use a review management tool. One such tool is Get FiveStars. It not only monitors reviews, but more importantly it provides tools to gather consumer feedback, send automated emails to customers to encourage positive reviews, and embed reviews and testimonials on your website.

To encourage more positive reviews:

▸ Make the process of leaving a review as easy as possible, such as by providing links to review sites in customer thank-you emails. The more positive reviews you have, the more they offset a negative review.

▸ Share positive reviews on social media channels, and thank the customers who gave them.

▸ Recruit or encourage brand advocates to share their positive experiences on blogs and social media.

But what if you get a negative review? Don't despair. Treat it as an opportunity to win a customer back and find out what your business might be doing wrong. To deal with negative reviews:

▸ Reach out to the bad reviewer and offer an apology and a free meal, product replacement, etc. Your efforts might just change a negative review to a positive one.

▸ Politely respond to public complaints -- in public. Let everyone see you care about

▸ sincerely fixing the issue. Consumers are impressed by businesses that care about making customers happy. (Not every business does!)

Analyze what went wrong. Empower your staff to resolve issues promptly without excuses in the future, even if it costs you.

GROWING ONLINE TRAFFIC

Just as your brick and mortar store relies on foot traffic, your website needs online traffic.

Certain techniques can really bump up your traffic:

▸ Blogging consistently on your own site on topics relevant to your business

▸ Guest blogging on other sites so you are exposed to new audiences

▸ Optimizing your site pages to be found in search engines, including sprinkling in relevant keywords (i.e. search terms that customers might use to find your product or service)

▸ Doing something newsworthy to get publicity such as sponsoring a local cause

▸ Getting interviewed for your expertise in media, blogs and podcasts

▸ Encouraging word of mouth from existing customers

▸ Being accurately listed in local listing sites

▸ Engaging on social media consistently

▸ Issuing a regular email newsletter and building your mailing list

▸ Buying online ads (great for new sites because results are immediate)

Install a traffic analytics program. As you implement marketing techniques, you will have a baseline to measure whether your results are paying off.

Analytics can collect information on visitors, referring websites, search engine traffic, marketing campaigns, traffic flow, page quality, conversion rates and much more. Use this information to continuously adjust and refine your digital marketing to grow your traffic.

MANAGING YOUR SEARCH ENGINE PRESENCE

Search Engine Optimization (SEO) is the process of optimizing pages of websites so they can reach a high position in the search results of search engines. The higher up in search results your pages appear, the more traffic you're likely to get.

SEO is achieved partly through content on your site (e.g. publishing a blog and optimizing page content with relevant keywords), through attracting links and referrals from other sites (e.g. getting media coverage), and through certain technical techniques (e.g. improving the ability of search spiders to "read" your pages).

Despite the simplicity of the above explanation, in practice SEO involves hundreds of factors and requires considerable expertise. It can take many hours to learn and carry out optimization strategies on your own. If you or your staff don't have time, you'll probably want to hire an SEO firm or consultant to assist. Ask around to your peers to see who they use -- lots of SEO firms are ready to help.

The major search engines offer important tools to assist in optimizing your site to get search traffic. Bing Webmaster Tools can help you to see how the Bing search engine interacts with your site. Google Search Console does something similar.

Both platforms provide data to help you to maintain your site without disruptions, resolve problems caused by spam or malware, and more.

Bing Webmaster Tools also offers an SEO Analyzer that makes recommendations for best SEO practices.

SEARCH AND SOCIAL ADVERTISING

When it comes to advertising, search engines and social media like Facebook are now top paid places to promote your business, because these are the places people spend their time online or check when they are shopping.

Just like with SEO, search ads and social ads may take time to master. However, you can hire consultants to manage and place your ads - typically starting at $250 a month on up depending on your volume of ad activity. Or you could test out a software-based ad management service such as WordStream. Not only will you save time, but the money you spend might be recouped (and then some!) through better ROI on your ad spend.

3 PRACTICE TIPS

▸ Adopt a long-term view for growing your Web presence. Spread out goals and activities over the entire year. Opt for consistent activity that you can sustain over a period of time, versus frenetic bursts of high activity followed by months of inactivity. Growing your Web presence is a marathon not a sprint.

▸ Don't get DIY-itis. It's tempting, especially for startup entrepreneurs, to want to do all your Web work yourself. But you can't know everything and you only have so many hours in a day. Outsource and delegate things requiring special expertise. Automate labor intensive tasks.

▸ Track, measure and adjust regularly. If you're doing the same things you were doing three years ago to attract website visitors, you're probably missing opportunities.

SOCIAL MEDIA: ENGAGE AND GROW

Customers today spend a lot of time on social media. In fact, 69 percent of U.S. adults use at least one social media site, according to the Pew Center.

These people are socializing, yes. But they also connect with vendors and service providers. So wouldn't it make sense to be where your customers spend time?

What's more, for smaller businesses, a presence on social media provides credibility. Customers today LOOK for businesses on social platforms. If you're not there, your business may not seem committed to being around for the long haul.

Social media also gives your business an opportunity to engage in a conversational way with customers and the public -- and build trust and interest in your business.

MARKETING PLAN FOR SOCIAL MEDIA

When it comes to social media, you'll need to formulate a social media marketing plan that's a subset of your overall marketing plan. Social media activity can be labor intensive. Without a plan and clear objectives, you may end up doing a lot of work with questionable returns.

However, with clear goals, you can better manage the time your company is putting into social media and what you want it to do for your business. If you track your progress, you'll be able to measure your return on your investment (ROI).

Start your plan by formulating goals you expect to achieve using social media. Some goals commonly identified by small businesses include:

▸ **Develop loyalty with existing customers -** By conversing with existing customers and listening in case they have support issues, you strengthen bonds. Also, being visible on social media helps you stay top of mind.

▸ **Build a mailing list -** Some businesses highlight the signup link to their mailing list or newsletter on their social channels. Some take it further and offer signup incentives.

▸ **Drive traffic back to website -** Social media can be a meaningful source of website traffic if you post links to all your new blog content. You can also post individual product listings from your eCommerce store. People will click through and visit your website.

▸ **Offer promotions and discounts to increase sales -** Customers are always looking for a deal. If you make it a regular habit to offer specials on your Facebook page or Twitter stream, people may start following you for that purpose.

▸ **Establish thought leadership -** By sharing expertise on social media channels, company executives can establish and enhance a reputation as experts and thought leaders. Thought leaders attract publicity, reinforce brand visibility, build credibility and help their companies stand out from the competition.

▸ **Expand brand recognition -** The more your brand is seen on social media, the more likely people are to recall it when they're ready to buy.

▸ **Generate leads -** Some marketers are adept at posting free content magnets such as ebooks, webinars and whitepapers, where readers must fill out a lead form to download or participate. Put links to these on your social channels.

▸ **Sell more in eCommerce -** ECommerce sellers with large and active social followings have learned to take advantage of commerce features offered on platforms like Facebook, Instagram and Pinterest.

Once you choose one or a few goals (not too many please!), your goals will guide your activities and approach. Let's take two examples:

EXAMPLE 1: If your main goal is to develop customer loyalty, you might spend time posting materials on Facebook and Instagram such as pictures/profiles of your customer support staff to humanize them and introduce them to customers. You might follow back your customers, chat with them, share and "like" their content, thank them when they leave a positive review, or otherwise demonstrate that you are listening to them.

EXAMPLE 2: If your main goal is to develop thought leadership, your approach would be much different. As the business owner, you might spend time curating and sharing lots of industry-specific news items on Twitter and LinkedIn. You might live tweet on Twitter from industry events, using a relevant hashtag. You might post links to your industry-relevant blog posts. Or you could upload the latest presentation you gave at a conference onto Slideshare.

There's no right or wrong. It all depends on your goals.

CHOOSING SOCIAL MEDIA CHANNELS

Once you've identified some marketing goals, another key step is to choose the best social platform or platforms to achieve them.

There are hundreds of social networks. But for small businesses in the English-speaking world, a handful of social media sites snag the majority of attention. Here are the most popular with small businesses (in no particular order):

▸ **LinkedIn** is a large professional network and is best for businesses that sell to other businesses (B2B) or those trying to build thought leadership in their industry. You can have a personal profile, company page, share content and publish articles on LinkedIn.

▸ **Twitter** is an important channel for thought leaders and for networking with customers, suppliers and partners. Currently in 2017 relevant tweets sometimes appear at the top of search results.

▸ **Facebook**, with 2 billion monthly users, is the largest and most popular social media network. It's ideal for those with consumer facing businesses but can also be used for B2B. Facebook ads can be cost effective, and can be targeted very specifically.

- **Pinterest** is an image based social media platform ideal for bookmarking (pinning) content. It's good for consumer facing businesses but is also leveraged by B2B businesses that have image based content such as infographics. Even a stock image on a blog post can be pinned, leading people back to read the post.

- **Instagram** is for sharing photographs. It's an option for highly visual businesses such as fashion designers, interior decorators and handmade makers, including those wanting to share photos or short videos of their products.

- **Google Plus** is not as vibrant as it once was, but still tends to be popular with tech enthusiasts who post content.

- **YouTube** is the largest video platform on the planet. "How-to" videos are among the popular kinds of YouTube videos and a small business that creates relevant how-to videos can use it to seed demand for products and services. Videos you load to YouTube can also be embedded in blog posts, doing double duty as website content.

- **Slideshare** is a place to upload and share presentations and documents. Now owned by LinkedIn, one of its best uses is to develop thought leadership. It is also a place to educate the public on a topic, and generate new B2B leads.

Finally, don't forget niche sites such as [BizSugar](#) and [Growth Hackers](#). Both are good for bookmarking and sharing B2B business content.

A FORMULA FOR SUCCESS THROUGH SOCIAL MEDIA

Social media can seem complex, but in reality the steps to successfully harness it for marketing are not hard. Here are seven steps to follow:

1. **PLAN**
    Start with a plan -- define a few (not too many) marketing goals as outlined above.

2. **IDENTIFY**
    Choose the right social platforms. [knowem.com](#) is a great tool to identify social platforms, especially lesser known ones. You can also use it to reserve your brand name on social sites even if you don't intend to spend much time on all of them.

3. **LAUNCH**

Launch your social presence by completing your profiles. Write engaging descriptions of your business, link back to your website, and load your logo and relevant images. Put up an engaging large "cover" image on profiles. Try to think of something creative to captivate attention. Use a tool like Canva or PicMonkey to create your own cover images. Or you can have an image professionally designed. For example, a custom-designed Facebook cover image will run you about $100 at DesignPax.

4. **FEED**

Feed content to your social accounts on an ongoing basis. It's not enough to set up a Facebook, Twitter or other account. If you plan to use it for marketing, you have to regularly feed content to it -- at least a couple of times a week. It doesn't have to be your own content. Become a "curator" of content from across the Web. Share others' blog and video content, and give them credit by tagging their social handles. This is a great way to make friends by showing you value their content enough to share it. The important thing is to show fresh activity.

5. **ENGAGE**

Social media success won't be found by posting an endless stream of content onto social media and doing nothing else. Instead, a big part is about being social. Just like in real life, you have to show you are interested in others. You must reply and comment occasionally. Hit the Like button when you see content from others you like. Share others' content. Follow others. Participate in the occasional Twitter chat or Facebook Live event, too. If you don't, your follower numbers will dwindle or stay stagnant. Nobody wants to follow a self-absorbed robot channel for long.

6. **AUTOMATE**

As your activity picks up, use technology to keep the workload down, save time and automate tasks. But don't lose the personal touch. Tools like Zoho Social, Buffer, Hootsuite and SocialOomph can help you manage your social activity, schedule updates and pull together all activity into a central place so you don't have to run around logging in everywhere. Used adeptly, a tool won't be noticeable by followers and won't make you seem impersonal. Remember, not everything can be automated nor should it be. But enough can be automated to save oodles of time and keep expenses down.

7. **MEASURE**

   Use social media analytics to track and measure progress toward your marketing goals. Analytics are built in to many social platforms such as Facebook, Twitter and Pinterest. But you can also find third-party tools that will provide key measurements in a consolidated dashboard and even schedule reports to be emailed to you. Apps like Zoho Social, Buffer and Hootsuite offer analytics and reports, for instance, along with managing your posting and alerting you to comments on your posts.

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3 PRACTICE TIPS

▶ Allocate resources for social media marketing. You're either going to spend time or money on social media -- or more likely, both. It's a marketing activity. Budget for it.

▶ Focus. While it's good to have profiles on all the main social sites, focus the bulk of your activity on two or three at most. This allows you to learn the platform features and you'll get more impact from your activity. Some businesses link from their profiles on lesser-used sites over to their most active profile.

▶ Don't forget to delegate. As an entrepreneur, it's easy to spend more time than anticipated on social media, distracting you from other priorities. Updating social media channels is one of the easiest things to delegate to a staff member who loves social media. Or outsource to a virtual assistant you can hire on any freelance marketplace such as Freelancer, Fiverr or UpWork. Or you can subscribe to a social updating service such as 99 Social for $99 a month.

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ABOUT

ABOUT SMALL BUSINESS TRENDS

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