

Resource Guide For OPERATIONAL FOUNDATION TOOLS

STREAMLINING FOR BUSINESS GROWTH & SUCCESS

#WORKSMART #DOMORE



RUN YOUR BUSINESS LIKE A *Boss*

You either have an awesome idea for a business and are ready to get started, or you've already started your business but are looking for some way to get yourself organized and streamlined. Either way, this is for you!

There are *so* many things to do as a business owner. So many systems and tasks, to set up and get done....Admin, Marketing, Sales, Operational, Online Presence, Project Management, Bookkeeping. And then you can breakdown each of those categories into a ton of other subcategories.

It can be overwhelming! But it doesn't have to be.

Hi! My name is Christelle Fernandez, and I am a geek of streamlining and business systems. I love helping Entrepreneurs and Small Businesses establish processes for their business, so they can dedicate their time to what they enjoy and are truly awesome at.

I put this guide together for you so you don't have to spend so much time researching what tools and apps to use. I've included some of the most popular apps for 2019 in the subcategories listed below. They're in no particular order.

Out of all the main business categories, it is MY belief that setting up the Operational one is most important. I feel it's the "gateway", if you will, to having great functionality in your other systems as well. If you set up your processes and automated workflows in this area, you will save time, headaches and stress.

Please keep in mind that any system, process or workflow WILL take some time investment on your part. But know and believe that it will all be worth it once set up and working as you envisioned.

Customer Relationship Management (CRM) Tools

Project Management Tools

Email Management Tools

PDF Editor Tools

Scheduling Tools

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) TOOLS

Resource	Description	Pricing	Notes
<u>Zoho CRM</u>	CRM Plus includes 10 apps Zoho One includes all apps in their suite	Free option CRM Plus: \$50/mon/user Zoho One: \$30-75/mon/user	A suite of 40+ different online business applications for collaboration, productivity, and other business tasks
<u>Contactually</u>	Get in contact with potential customers	Free 30 day Trial 3 Plans range from \$39-399/mon	Connect unlimited email accts, Follow up reminders, Social network integrations, Bulk
<u>Insightly</u>	Manage contact information for your customers, vendors, or partners	Free for up to 2 users 3 Plans range from \$29-99/mon	Lead Management, Contact Management, Integrations, Mass Email
<u>Keap</u> (formerly known as Infusionsoft)	Designed for can-do small businesses looking to centralize data and deliver great customer service.	Free trial Plans range from \$99-299/mon	Organizes your client information and daily work in one place, freeing you up from repetitive tasks.
<u>Vtiger</u>	Open Source CRM software	Free trial Plans range from \$30-42/mon	Marketing, sales, support, productivity, project management, inventory
<u>Hubspot</u>	Marketing, sales, & service software that helps your business grow without	Free option Starting at \$50/mon	For businesses wanting a free, no-frills CRM with basic features
<u>Dubsado</u>	From invoicing, signing contracts, scheduling appointments,	Starting at \$35/mon	For Consultants or freelancers wanting a CRM to manage one-off jobs and track hourly

PROJECT MANAGEMENT TOOLS

Resource	Description	Pricing	Notes
<u>Asana</u>	Follow up of tasks and schedule	Free option Upgrade Plans range from \$9.99-19.99/mon & more	You work on workspaces and projects in every workspace
<u>Trello</u>	Project and task manager	Free option Upgrade Plans range from \$9.99-20.83/mon	Unlimited boards, lists, cards, members, checklists, attachments, Basic integrations with Box, Drive, and Dropbox, File attachments up to 10MB
<u>Zoho Project</u>	Project and task manager	Plans range \$20-125mon Included in larger Zoho App Suites	Gantt Charts; Project Coordinator; Timesheet; Reporting Tools; Collaboration Software; Document Management; Bug Tracker
<u>Evernote</u>	Note & task manager	Free option Upgrade Plans range from \$7.99-14.99/mon	Data capturing service that makes it easy to remember things using your computer, phone, and the web
<u>Wrike</u>	Work management solution	Free option Upgrade plans range From \$9.80-24.80/mon & more	Cloud-based collaboration and project management software that scales across teams in any business.
<u>Basecamp</u>	Project management & work place collaboration	Free 30 day trial \$99/mon	Combines all the tools teams need in a single, straightforward package

EMAIL MANAGEMENT TOOLS

Resource	Description	Pricing	Notes
<u>Drag</u>	Organize your inbox for faster, easier, more seamless performance, communication, and collaboration.	Free trial Plans range from \$3-49/mon	Turn Gmail into one single, collaborative workspace.
<u>Zoho Mail</u>	Smart software app for growing businesses, helping you attract, retain, delight customers, and grow your company.	Plans range From \$1-6/mon Included in larger Zoho App Suites	Complete set of tools needed for Workplace communication and collaboration.
<u>Front</u>	Efficient inbox management app featuring a unified inbox that consolidates multiple channels in one place for better team collaboration.	Free trial Plans range From \$15-59/mon	Conquer email overload with shared inboxes
<u>Yesware</u>	Connect with prospects, track customer engagement, and close more deals, right from your inbox.	Free trial Plans range From \$12-55/mon	All-in-one sales toolkit. Track email open and reply rates, link clicks, attachment opens and presentation pageviews.
<u>Microsoft Outlook</u>	Popular email organizer with a built-in calendar and other tools that help people communicate and stay on top of things .	Prices thru Office 365 or MS Office Suite	Limit the chaos of your inbox with Unsubscribe and Sweep. Neat and tidy have never been easier.
<u>Gmail</u>	Webmail system and email service built and developed by Google for companies, teams, and individuals.	Free Upgrade plans range from \$5-25/mon/user	Part of Gsuite for Business

PDF EDITOR TOOLS

Resource	Description	Pricing	Notes
ApowerPDF	Create, edit & view PDFs, as well as convert PDFs	Free	Comprehensive program that is capable of editing, converting, creating and viewing PDF documents.
<u>PDF-XChange Editor</u>	Create, View, Edit, Annotate, OCR and Digitally Sign PDF files plus much more	Free	Editor Plus license includes ability to Create and Edit fillable forms. Includes PDF-XChange Lite printer.
<u>Sedja</u>	Online PDF Editor	Free option Plans range from \$7.50/mon to \$63/yr	Has web and desktop versions. Edit, fill, sign, convert PDFs
<u>pdfforge PDF Architect 6 Professional</u>	Customizable PDF Editor	\$69.00	Advanced PDF solution with everything you need to customize, secure, and collaborate on your PDF documents.
<u>Nitro Pro 12</u>	PDF editor that will streamline your document workflow	\$159.00	Nitro Productivity Suite includes e-signing, PDF productivity and more
<u>Adobe Acrobat Pro DC</u>	Comprehensive PDF features	\$179.88	Acrobat desktop software you know, plus Document Cloud services that keep you more productive, collaborative, and mobile.

SCHEDULING TOOLS

Resource	Description	Pricing	Notes
<u>Timetrade</u>	Intelligent Online Appointment Scheduling	Free option Plans start at \$6.50/mon	Helping teams in any industry to connect and engage with prospects, customers and clients.
<u>Caldenly</u>	Automated scheduling software	Free option Upgrade plans range From \$8-12/mon	Take the work out of connecting with others so you can accomplish more.
<u>Acuity</u>	Appointment scheduling	Free trial Plans range from \$15-50/mon	User friendly scheduling tool for running your business end to end