



TOP

12

TECH
TIPS FOR
SMBS

BY

logic*wing*



**HOW TO BILL AND
WHO YOU OWE**

**A RHYMING SONG
TO HELP YOU
GROW
(YOUR BUSINESS)**

**USING THE
ACRONYM**

COPY AND PASTE



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COMMUNICATION

**FOLLOW UP WITH CUSTOMERS
USING EMAIL & SOCIAL MEDIA**

**COLLABORATE WITH STAFF &
CLIENTS USING A CLOUD
PLATFORM**

**USE CRMS TO TAKE YOUR
BUSINESS ON THE GO!**

**REMEMBER:
PEOPLE HAVE TO BE ABLE
TO REACH YOU**

**POST AND SHARE
MAKE YOUR CLIENTS CARE**

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OPERATIONS

**MAKE SURE YOU HAVE A
SYSTEM FOR EVERYTHING**

HOW ARE YOUR FILES STORED?

HOW DO YOU TALK TO NEW CLIENTS?

**WHAT IS THE CHAIN OF COMMAND
WHEN A CLIENT HAS A PROBLEM?**

**WHO IS RESPONSIBLE FOR FILING
TAXES AND LEGAL DOCUMENTS?**

**USE A CRM TOOL LIKE
SALESFORCE TO AUTOMATE
& ORGANIZE PROCESSES**

**ORGANIZE YOUR CLIENTS
HOW YOU KNOW BEST**

**USE CRMS AND YOU'LL DO
BETTER THAN THE REST**

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PDFS

**USE AN EDITABLE PDF PROGRAM
TO MAKE FILLING OUT & CREATING
DOCUMENTS ONLINE EASIER**

**USE TOOLS LIKE DOCHUB,
HELLOSIGN, & PREVIEW FOR
ESIGNING DOCUMENTS**

**SPEAKING OF APPS: REMEMBER TO
ONLY SUBSCRIBE TO APPS YOU NEED**

**AND GET RID OF SUBSCRIPTIONS
WHERE YOU CAN'T INVEST THE TIME**

**EDITING PDFS EASILY ONLINE
THIS WILL SAVE YOU A LOT OF TIME!**

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YOUR NAME

**YOUR COMPANY NAME SHOULD
REFLECT YOUR SERVICES AND/OR
INDUSTRY**

**YOU CAN ALSO USE A DBA TO
"CHANGE" YOUR EXISTING NAME
TO SOMETHING MORE RELATED
TO YOUR BUSINESS**

**GET A ".COM" DOMAIN
FOR YOUR BUSINESS**

**GIVE YOUR COMPANY
A GOOD NAME
AND MAKE SURE TO
CLAIM THAT DOMAIN**

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ACCOUNTING

USE A CLOUD-BASED ACCOUNTING PLATFORM SO YOU CAN INVOICE ON THE GO!

SOME OF THE MOST COMMON PLATFORMS ARE QUICKBOOKS, FREEAGENT & XERO

DEPENDING ON THE ACCOUNTING SOFTWARE YOU CHOOSE, YOU CAN ALSO AUTOMATE INVOICES & KEEP TRACK OF HOURS WORKED TO BILL MORE EASILY LATER

WHO KNEW BILLING COULD BE SO THRILLING!

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NETWORKING

**FIND EVENTS ONLINE TO GAIN
NEW CUSTOMERS & FORM
RELATIONSHIPS WITH OTHER
ENTREPRENEURS**

**WHERE TO FIND EVENTS:
EVENTBRITE**

CLUBHOUSE (VIRTUAL)

SMALL BUSINESS ADMINISTRATION

**YOU CAN ALSO JOIN YOUR LOCAL
CHAMBER OF COMMERCE**

**IF YOU DON'T NETWORK
YOU'LL GO BROKE**

**FIND AN EVENT AND MEET
SOME FOLKS!**

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DOCUMENTS

**STORE YOUR DOCUMENTS
DIGITALLY IN THE CLOUD**

EVEN IF YOU KEEP HARDCOPIES ANYWAYS

**IT'S SAFER & YOU WILL NEVER
LOSE A DOCUMENT AGAIN**

**JUST MAKE SURE TO USE A SECURE,
SEARCHABLE CLOUD PLATFORM
LIKE EVERNOTE**

**IT'S ALSO EASIER TO FILE TAXES WHEN
YOUR DOCS ARE ALREADY DIGITAL**

**TO KEEP YOUR DOCS
ORGANIZED AND SAFE
THE CLOUD WOULD BE
THE PERFECT PLACE**

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PURCHASING

**IF YOU'RE NOT A RESELLER &
YOU NEED TO PURCHASE ITEMS
FOR A CLIENT:**

**MAKE THE PURCHASE ONLINE AND
USE THE CLIENT'S CREDIT CARD
(GIVEN OVER THE PHONE AT THE TIME OF
PURCHASE)**

**IF YOU USE YOUR CREDIT CARD,
YOU HAVE TO DEAL WITH
SALES TAXES, BILLING,
& MISCELLANEOUS CHARGES**

**IT'S A HASSLE
ESPECIALLY IF THE CLIENT WANTS TO
RETURN THE ITEM LATER**

**WANT TO MAKE SURE YOU
DON'T GET CHARGED?
PAY WITH YOUR
CLIENT'S CREDIT CARD**



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APPLICATIONS

RESPONDING TO REQUESTS FOR PROPOSALS OR CONTRACTS THAT REQUIRE BIDS DOESN'T NEED TO BE STRESSFUL

CREATE A DOCUMENT WITH YOUR SAVED RESPONSES

THEN COPY & PASTE WHEN READY TO FILE

IF YOU TAKE TOO LONG FILLING OUT FORMS ONLINE, YOU MAY GET KICKED OUT

SUBMITTING BIDS ONLINE?

DON'T FEEL UNEASY

TAKE YOUR TIME.

SIGN THE LINE. IT'S BREEZY!



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**STATE & SALES
TAXES**

**DON'T FORGET TO FILE
STATE & SALES TAXES**

**MAKE SURE YOU KNOW WHICH
TAXES YOU HAVE TO FILE
THROUGHOUT THE YEAR
& WHEN THEY'RE DUE**

PUT THE DATES IN YOUR CALENDAR!

**AND MAKE IT EASIER FOR
YOURSELF - FILE ONLINE**

**REMEMBER TO E-FILE
IT'LL BE WORTHWHILE**

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TRACK YOUR TIME

**USE A CLOUD-BASED CALENDAR
TO MANAGE YOUR TIME**

**ADD MEETINGS, EVENTS, & TASKS
& BLOCK OFF TIME DEDICATED TO
UNINTERRUPTED WORK**

**MAKE IT YOUR ONE-STOP,
DAILY TO-DO LIST**

**MEMORIZE THE LINE:
IF IT'S NOT ON THE CALENDAR,
IT DOESN'T EXIST!**

**MANAGE YOUR TIME
GET READY FOR WORK
CLOUD-BASED CALENDARS
OFFER MANY A PERK!**

COPY AND PASTE



EVALUATION

INFORM YOUR BUSINESS WITH DATA

STEP 1:

CREATE ONLINE SURVEYS TO HAVE CLIENTS EVALUATE YOUR WORK

STEP 2:

PUT THEIR ANSWERS IN A SPREADSHEET

STEP 3:

ANALYZE THE DATA TO SEE WHERE CHANGES CAN BE MADE

USE PROGRAMS TO AUTOMATICALLY ANALYZE THE DATA FOR YOU

EVALUATE YOUR WORK WITH SURVEYS AND SHEETS

**ANALYZE EVEN THE SMALLEST OF DEETS!
(DETAILS)**



**WE KNOW
BUILDING A
BUSINESS CAN BE
A CHORE**

**BUT WE HOPE THIS
HAS HELPED YOU
MAKE MORE
(MONEY)**

CONTACT US

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