

Six tools to modernise your growing businesses



Navigating the events of the past two years has amplified the existing need to support the success of small businesses.

It has become clear that businesses need to have the right technological tools in place to ensure both continuity and sustainability.

Modernising a business can be difficult, not to mention overwhelming—especially for smaller businesses that are already strapped for cash, time and resources.

A business doesn't always need to be at the forefront, investing in the latest thing, but taking advantage of today's technology is vital.

Here are 6 simple tips to help take your small business to the next level.



1 Customer relationship management (CRM)

It can be a small business-eats-small business world out there, so you have to lean on technology to help keep your customer relationships strong. Customer Relationship Management (CRM) software is how you hold customers' attention, foster deep engagement and earn the loyalty that helps you start swimming with real success.

Why you've got to implement CRM (customer relationship management) software

A Customer Relationship Management (CRM) application manages contacts, tracks information and analyses data. It gives you a single source of truth for all of your business activity and helps you scale as you grow. Contracts, documents, sales forecasts? Yep, they're all there. You can even use it to automate pesky tasks, report on sales activity and personalise communications. But more than that, your Customer Relationship Management (CRM) technology allows you to better track, manage and serve your customers, perhaps the most important task and differentiator in today's economy. Once you've implemented this transformative technology just watch your incremental revenue and customer satisfaction (CSAT) rise.

Where to start

If you've decided this software is something your business could benefit from, here are some things to consider:

Ease of use

How quickly can you get up and running?

Customisation

Can you make it fit your business and terminology?

Integration

How easily can you connect to your other systems?

Scalability

Will it grow with you as your business expands?

Budget

Are the features you need included in the base price?

Luckily, there are plenty of great Customer Relationship Management (CRM) options, even ones created specifically to help smaller businesses grow and scale. Most have a free trial period where you can try them out to see if they are right for your business needs.

Bonus: Most integrate with [DocuSign eSignature](#) to give your productivity another boost.

Try out some Customer Relation Management (CRM) tools

[Salesforce for Small Businesses](#)

Even a basic Salesforce-powered system can help you keep up with the innovation curve that all growing businesses face today.

[Pipedrive](#)

Closing a deal and then keeping that customer happy has never been faster or easier for your smaller growth business. With Pipedrive users close an average of 28% more deals within their first year of using the Customer Relationship Management (CRM) system.



2 Collaboration

There's more to your files than you think. The way you manage your market research reports, budget spreadsheets and supply-chain flows can not only differentiate you from your competitors, it can often play a huge role in your success. Leveraging the latest collaboration tools helps your team work together seamlessly from anywhere.

Why you've got to invest in collaboration

Whether your team is in an office, hybrid or remote, there's not always time to gather everyone for face-to-face meetings to brainstorm, plan, and review. Thankfully there are tons of online productivity tools to increase both efficiency and accountability. File sharing tools let you review documents and collaborate in real time in a single shared view. Video conferencing allows you to meet virtually face-to-face to erase the boundaries of remote work. And project management software keeps everyone on track via shared calendars, automated routing, alerts and approvals.

Where to start

if you're ready to give collaboration tools a try, here are some things to consider:

Packages

Are there suites of tools for a bundled price?

Price

Are there any hidden costs on top of the monthly fee?

Security

Are your contacts, data, and files protected?

Mobile

How easily can your team use the tools from mobile devices?

Integration

Will these tools work with your other tools?

Consider whether individual tools will work, or if you'd be better off with a full project management solution. Be sure to solicit advice from others who've used these tools; firsthand experience is gold.

Try out some collaboration tools

Microsoft SharePoint

An intelligent, mobile intranet platform that lets you create a centralised digital collaboration and storage system for your people. Here, you and your team can safely manage, share and store files, as well as interact with one another right within the platform.

Google Drive

Connect documents to your internal and external collaborators, enabling in-app comments from anyone—that trigger email notifications to those involved. Optimise your existing workflows in a completely secure way.



3 Finance and resource planning

If your businesses is like most, you may have initially used spreadsheets or paper ledgers to track your finances. That's a good tactic to start out with, but as your business grows, it will almost certainly become a challenge to stay on top of all your transactions with this kind of manual accounting system. That's where accounting software comes in.

Why you've got to introduce accounting software

On-demand accounting software is a must-have for starting and running a business today. Pen-and-paper finances leave too much room for error, and even spreadsheets aren't foolproof. At a basic level, accounting software makes it much easier to record and track your income and expenses; beyond that, it also helps you manage your finances, secure the right documents, stay in compliance and handle payroll. Today's apps even allow you to do all of these fundamental activities from your tablet or mobile device. With everything stored safely in the cloud, you'll have the peace of mind you need to know your data and business are protected.

Where to start

If you're looking to implement accounting software, here are some things to consider:

Data security

Does it use a secure HTTPS connection for your data?

Features

Does it offer everything you need—invoicing, expenses, taxes, payroll?

Ease of use

How easily can you get started and up to speed?

Hidden costs

Are there any add-ons or a yearly maintenance fee?

Customer service

How do you access help and is it available 24/7?

Be sure to evaluate providers closely and find one that grows with you. Once you're up and running with one accounting solution, it can be complicated to move to another one as you change or expand.

Try out some accounting software

[Quickbooks Online Advanced](#)

Work smart and grow fast. Quickbooks Online Advanced is about all things accounting, in one cloud-based place. Easily manage your money, track time on any device and get paid anywhere. From simple income and expense tracking to robust cash flow management and reporting, this integrated tool keeps your finances organised and in view.

[Oracle NetSuite](#)

Oracle Netsuite is the #1 cloud Enterprise Resource Planning (ERP) cloud software for the midmarket, globally. It's a unified business management suite, encompassing ERP, financials, and e-commerce—for when you're ready to sell online.



4 Human capital management (HCM)

Attract, recruit, train, develop and retain the best employees to achieve short and long term objectives. HCM companies allow businesses to invest in their employees allowing them to contribute at the highest level in order to achieve business goals.

Why you've got to use HCM systems

Confidently manage your internal-business demands. Know how employee engagement impacts your bottom line. A digital hiring and onboarding process increases efficiencies, modernises the overall experience and improves accuracy—allowing you to stay ahead of competition and hire top talent.

Where to start

If your business would benefit from human capital management tools, here are some things to consider:

Ease of use

How quickly can you get up and running?

Integration

Does it connect easily to the other systems that you're already using?

Scalability

Will it grow with you as your business expands?

Data security

Does it use secure HTTPS connection for your data?

Try out some Human Capital Management (HCM) tools

[Workday](#)

Workday helps you digitise HR processes and create employee value by measuring and anticipating what employees need and want today as well as tomorrow.

[SAP SuccessFactors](#)

Deliver experiences that serve employees first and serve the business better. SAP offers truly dynamic, engaging, and employee-centered experiences that support employees throughout their careers and enable human resources leaders to accelerate business growth.



5 Marketing

Today's online marketing tools make it easy to customise your marketing, from websites to campaigns.

Why you've got to implement marketing tools

Every company should have an easily customisable property (like a website or blog) to use for sales, marketing, and customer service; it's how you communicate your message and value. Fortunately, there are plenty of great tools that can help your business build customised websites to solidify your brand, capture leads and create integrated campaigns, all without the help of a developer. No need to limit your target customers to the local area served by your storefront either—just integrate an e-commerce solution to your website to broaden your business and share your products and services with the world.

Where to start

If you're ready to implement some marketing solutions, here are some things to consider:

Ease of use

Is the software intuitive or does it require training?

Pricing structure

Are you limited by a number of pages? Are analytics extra?

Capabilities

Does it offer a variety of templates to use?

Mobile readiness

Are pages automatically optimised for mobile devices?

Customer feedback

What are current and previous customers saying?

Streamlined marketing helps you build more personal connections to your customers and grow your base. Companies that use marketing software often report higher levels of web traffic and more buyers.



6 Electronic signatures

Stop with the pen-and-paper forms, fax machines, and scanners. e-Signatures are a safe and easy way to boost efficiency, wow your clients and modernise your business.

With DocuSign:

82%

of agreements are completed in less than a day

49%

of agreements completed in less than 15 minutes

£30

the average savings per agreement, by reducing hard costs and improving employee productivity

350+

pre-built integrations securely connect DocuSign eSignature to the applications you use every day

Why you've got to implement DocuSign eSignature

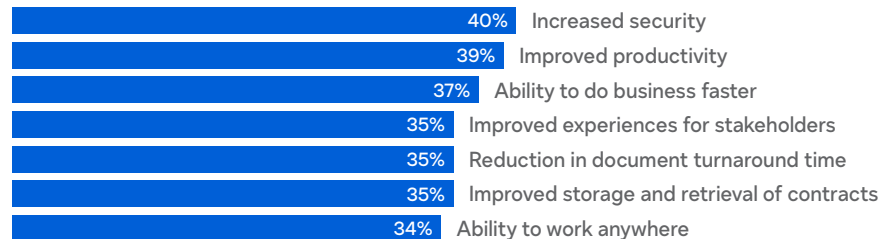
Think about how long it takes you to create a contract, send it out and get it back using your current process. What happens when you discover a mistake or something that needs to be updated? An inefficient agreement process leads to delays, unnecessary costs and poor customer service. Electronic signatures help get remote work done faster and easier. A recent report published by the expert Industry Working Group on Electronic Execution of Documents published their analysis of the current state of e-signatures in England and Wales. It found that individuals and businesses can and should safely use electronic signatures because—as noted by Lord Justice Birss—‘there is no need for old fashioned pen and ink’. Electronic signatures have proven that they are secure, reliable, fast and convenient.

Where to start

If your business hasn't switched to electronic signatures, now's the time. [DocuSign eSignature](#) helps businesses of any size speed the signature process in a simple, safe, and secure way. Getting started is easy.

[Sign up for a 30-day free trial.](#)

Benefits of using e-signature



Source

Simple, secure, safe: try DocuSign eSignature now for free

Advances in technology make work safer and more convenient than ever. Start with DocuSign, the world's #1 way to send and sign from practically anywhere, at any time. DocuSign eSignature helps your smaller business grow and scale with an easy, secure way to speed up transactions—not to mention a simple way to improve customer and employee experience.

Try [DocuSign eSignature](#) now for free.

About DocuSign

DocuSign helps organisations connect and automate how they prepare, sign, act on and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

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