Software Tools & Services Checklist

With Recommendations

PRODUCTIVITY TOOLS

- ○ Email *(Outlook, Mail client on Mac)*
- ○ Calendar *(MS Calendar, Calendly)*
- ○ Chat Messenger *(Slack)*
- ○ Productivity Software *(MS Office, Google Suite)*
- ○ Video Conferencing *(Google Meet, Zoom)*
- ○ Task Management tool *(Notes, Evernote)*

OPERATIONS

- ○ CRM *(Salesforce, Zoho)*
- ○ Lead Management *(Salesforce, Zoho)*
- ○ Inventory Management *(Spreadsheet)*
- ○ Schedule tracker *(dependent on biz)*
- ○ Payment Processing *(Square, Chase Paymentech)*
- ○ Book-keeping software *(Quickbooks)*
- ○ Accounting software *(Quickbooks)*
- ○ Answering Service *(Perceptionist)*
- ○ Learning Management *(dependent on biz)*

HR OPERATIONS

- ○ Payroll Processor *(Gusto, Paychex)*
- ○ People Resource Management *(Gusto, Salesforce)*
- ○ Job Boards *(Indeed, Zip Recruiter, Linked In)*
- ○ Background check *(SentryLink, Courthouse Concepts)*
- ○ Clock in/ Clock out tool *(Homebase, Clockify)*

MARKETING

- ○ Email Marketing *(MailerLite, Constant Contact)*
- ○ SMS Messaging *(Text Request, Textedly)*
- ○ Social media *(Google Business, FB, IG, Twitter, Pinterest)*
- ○ Reviews Services *(Opinion or Dispatch)*
- ○ Print Asset/ Design *(Canva)*

ADVANCED MARKETING

- ○ Keyword Research *(Google Keyword Planner, Ubersuggest)*
- ○ Paid Ads *(Google PPC, Google LSA)*
- ○ Analytics *(Google Analytics)*

OTHER SERVICES

- ○ Phone system/ VoIP phones
- ○ WIFI
- ○ Security System