

Out with the Old, In with the New

# Five Must-Have Tools to Modernize Your Small Business

**Do you ever shudder when people start talking about advancements in technology? AI and voice recognition are exciting and all, but what about all the small and medium-sized businesses that are just trying to find more customers or keep the lights on?**

**We hear you. Keeping up with technology is daunting for companies of any size — and nearly impossible for smaller businesses that are almost always strapped for cash, time and resources. Yet it's crucial for them to bring their systems and processes up to date to remain competitive. 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.**

### **Stop doing things the old way**

**Ready to get with the times? Leave those ancient systems and antiquated practices behind. Out with the Rolodexes, Yellow Pages, ledgers and filing cabinets — It's time to invest in technology. Here are five simple updates to help you modernize your small business in 2020.**

# 1 Switch to accounting software

## Old versus new

Ye olde paper ledgers have got to go. Accounting software makes it easy to stay on top of your financial health.

## Why you've got to do it

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 evaluate accounting solutions, 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.

## 2 Move to electronic signatures

### Old versus new

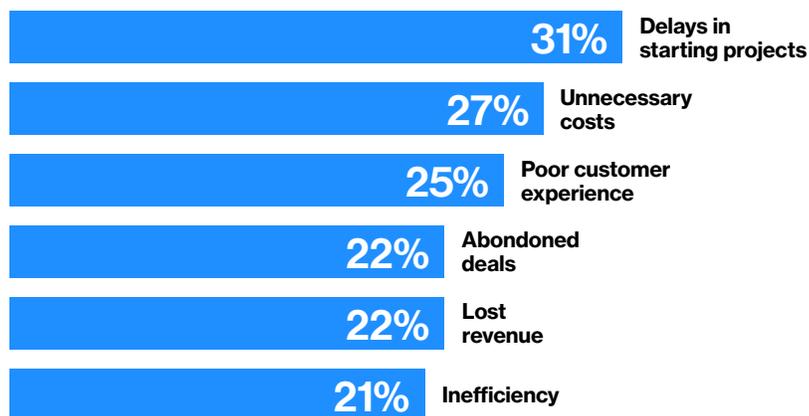
Stop with the pen-and-paper forms! Lose your fax machines and scanners! eSignatures are an easy and inexpensive way to boost efficiency, wow your clients and modernize your business.

### Why you've got to do it

Think about how long it takes you to create an agreement, send it out and get it back using your current process. What happens when you then discover a mistake or something that needs to be updated? An inefficient agreement process leads to delays, unnecessary costs and poor customer service – all of which are inexcusable in today's modern world. Electronic signatures have been mainstream for more than 20 years now – they're proven secure, reliable and about a jабillion times faster (give or take) than that pen-and-paper route you've been using.

### Where to start

If your business still hasn't switched to electronic signatures, now's the time. DocuSign eSignature helps businesses of any size speed the signature process in a simple, secure way. Getting started is easy – Sign up for a free trial at [docusign.com/sign](https://docusign.com/sign).



DocuSign's mobile app lets you do business 24/7 from wherever you are, and there's a support center to help with any issues you run into. Plus, DocuSign offers low rates with no hidden fees. So go on, sign like it's 2020 – [starting now](#).

## 3 Test drive CRM

### Old versus new

Still running on sticky notes, a Rolodex and filing cabinets? It's time to move past those outdated systems and try Customer Relationship Management (CRM).

### Why you've got to do it

A CRM application manages contacts, tracks information and analyzes 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 personalize communications. But more than that, your CRM technology is how you better track, manage and serve your customers, perhaps the most important task and differentiator in today's competitive economy. Then watch your incremental revenue and customer satisfaction (CSAT) rise.

### Where to start

If you're ready to evaluate CRM providers, here are some things to consider:

**Ease of use.** How quickly can you get up and running?

**Customization.** 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 CRM options, even ones created specifically to help small businesses grow. 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.

## 4 Add some collaboration

### Old versus new

Still relying on in-person meetings, file cabinets, and a white-board calendar? The latest collaboration tools help your team work together seamlessly from anywhere.

### Why you've got to do it

Business moves at lightning speed today, and there's not always time to gather your team for face-to-face meetings to brainstorm, plan, and review. Thank goodness 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 keep everyone on track via shared calendars, automated routing, alerts and approvals. You can even add DocuSign eSignature to take your productivity even farther.

### Where to start

If you're ready to evaluate collaboration tools, 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.

## 5 Upgrade your website

### Old versus new

No need to keep making flyers and placing those ads in the Yellow Pages. Today's online marketing tools make it easy to customize your marketing, from websites to campaigns.

### Why you've got to do it

Every company should have an easily customizable 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 customized 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 with your website to broaden your business and share your products and services with the world.

### Where to start

If you're ready to evaluate 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 number of pages? Are analytics extra?

**Capabilities.** Does it offer a variety of templates to use?

**Mobile readiness.** Are pages automatically optimized 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.

## Sign like it's 2020: Try DocuSign now for free

Advances in technology make work more convenient than ever. Why are you still doing things the old-fashioned way? You don't have to upgrade to a self-driving car just yet, but at least get out of the horse-drawn carriage.

Start with DocuSign, the proven leader in electronic signatures. DocuSign eSignature brings your business into the future with an easy, secure way to speed up transactions.

Sign like it's 2020. Visit [docusign.com/sign](https://docusign.com/sign) now to get started for free.

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### About DocuSign

DocuSign helps organizations 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, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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