

A Guide to Small Business Technology (2023 Edition)



TECH-DRIVEN GROWTH FOR SMALL BUSINESS

Learn how to harness the power and avoid the pitfalls of technology for your business.

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I'M JOE GUEVARA

WELCOME

I started **Rehash Digital** with a single mission - to help thousands of Small Businesses across North America harness technology so that they can compete and thrive! Technology evolves at such a pace that no single small business can stay in tune with the changes all the time - and I'm here to help face that challenge with you.

HOW CAN I HELP YOU?

I love connecting & engaging with Small Businesses around the world. Connect with me & Join a community of like-minded business owners!

Joe Guevara, Founder

WWW.REHASH.TECH



Reality Check



"When small businesses shy away from technology, they inadvertently hand over their growth potential to competitors who eagerly embrace it."

Customer Relationship Management 101

Strengthen Customer Relationships



In this chapter, we introduce you to the vital role of Customer Relationship Management (CRM) in effective customer management and business growth. Learn how to select the right CRM solution for your business and seamlessly integrate it into your sales and support processes to optimize customer interactions and drive unparalleled satisfaction. Elevate your customer relationships and foster lasting loyalty with the insights and tools provided in this chapter.



Chapter 1: Strengthening Customer Relationship

As a small business owner, you know that building strong connections with your customers is the lifeblood of your success. In this chapter, we'll explore a game-changing tool that can take your customer management to new heights - Customer Relationship Management (CRM).

Understanding how CRM can revolutionize your business, replace outdated processes, and streamline operations is essential for your business's growth and longevity. Let's dive into the world of CRMs and unlock the secrets to fostering lasting customer relationships that drive your business forward.

Embrace the potential of a CRM to nurture lasting connections, fuel growth, and elevate your small business.

Part 1: Customer Relationship Management 101

01

What on earth is a CRM?

A Customer Relationship Management (CRM) system is a powerful software solution designed to streamline and optimize customer interactions and data management. By centralizing customer information, communication history, and sales data, a CRM enables you to gain valuable insights and provide personalized experiences.

02

Say no to Spreadsheets!

CRMs replace manual and disparate processes that small businesses often struggle with. Gone are the days of scattered spreadsheets, sticky notes, and lost emails.

With a CRM, you can bid farewell to the chaos of manual data entry and repetitive tasks. Instead, you'll have a user-friendly interface that simplifies customer management, automates mundane processes, and empowers you to focus on building meaningful relationships with your customers.

Part 2: Selecting the right CRM for your business



What's the right CRM for me?

Numerous CRM software options are available in the market, each tailored to meet various business needs. The 2 most popular with medium to large businesses are **Salesforce** and **Hubspot** because they are heavily customizable (at a very high cost).

However, when selecting the right CRM for a small business, you're going to want a solution that's specialized to your industry so the customization is already done for you!

For example for industries like Home Services, HVAC Companies, Health Services, and even Law firms - solutions like **Thryv Software** are pre-customized to how each industry does business (as simple as changing things like Job to Client to Patient when referring to different fields).



Part 2: Selecting the right CRM for your business



Key Takeaways

It's essential to choose a CRM that aligns with your business goals and workflows. A cloud-based CRM is often a popular choice as it provides flexibility, easy access, and seamless updates.

Also consider a CRM if instead of your industry, you have a very specific focus on a business function like B2B sales. Solutions like **Hubspot** & **Salesflare** focus deep on business functions like direct sales if you want customization in that specific area.

Don't forget to explore user reviews and take advantage of free trials to get a hands-on feel for how the CRM performs with your specific requirements.



Part 3: Implementation & Integration

01

How to get results & avoid "shelfware"

Once you've selected the ideal CRM for your business, the next crucial step is implementation and integration. To ensure a smooth transition and maximum benefit, **involve your team in the process.**

Provide training sessions to help your team members understand the new system and its advantages fully. Additionally, work with the CRM vendor's support team or consider hiring a consultant like [Rehash Digital](#) to guide you through the setup, training, and change management process.

02

Integration or Bust

Integrating your CRM with other essential business tools, such as email marketing, helpdesk systems, or e-commerce platforms, further enhances your operational efficiency and data accuracy. A well-integrated CRM acts as a "single source of truth", facilitating seamless information flow across different departments, leading to **a holistic and customer-centric approach.**

On the flip side, if you don't integrate - you may just be adding more work to your plate and is usually the biggest cause of poor customer experience with these kinds of software.

Conclusion



A Good CRM aligns with Business & Customer Strategy

As we conclude this chapter, remember that implementing a CRM is not just about adopting new software; it's about transforming the way you interact with your customers. By centralizing data, automating tasks, and fostering personalized communication, a CRM empowers your small business to thrive in an increasingly competitive market.

Harness the power of a CRM and elevate your customer relationships to unprecedented heights, propelling your business towards sustainable growth and success. The journey to mastering customer relationships has just begun, and the rewards will undoubtedly be worth it. Onwards to Chapter 2!

Business Automation 101

Automating Your Business



This chapter is your gateway to hassle-free operations as a small business owner looking to get more time & money. Learn simple steps from automated appointment scheduling to discovering the power of automated sales & marketing. Embrace automation's simplicity and witness increased efficiency, fewer errors, and a healthier bottom-line without being overwhelmed.



Chapter 2: The Automation Advantage

As a small business leader, you should be always seeking ways to enhance productivity, reduce manual efforts, and scale your operations efficiently. In this chapter, we'll dive into the world of automation and explore how it can be a game-changer for your business.

Understanding how automation works, what processes can be automated, and which automation tools are specifically tailored to small businesses is crucial to unlocking its true potential. Get ready to revolutionize your business by harnessing the immense power of automation!

*Don't let
repetitive tasks
hold you back
from growth;
automate and
unleash your
small business's
true potential!*

Part 1: Automation for Small Businesses

01

What do you mean by "Automation"?

Automation involves using technology to perform repetitive tasks and processes without manual intervention. This not only saves time and effort but also reduces the likelihood of human errors, ensuring greater accuracy in your business operations.

By automating mundane tasks, you free up valuable resources that can be channeled into more strategic activities, like business development, customer engagement, and innovation.

02

SMB vs. Enterprise Automation

Large companies pay a LOT of money for automation technology like RPA - I worked with a major US bank and they spent over \$2.4m per year to reduce their loans process by 2 clicks!

Luckily for small businesses, most of the automation you can get from off-the-shelf software.

Part 2: What can/should you Automate?

The possibilities for automation within a small business are vast.

Some of the most common processes that businesses should look at automating to get the best results are:

- **Appointment Scheduling:** Automate appointment bookings and reminders, simplifying the scheduling process for both you and your customers - whether links through e-mail or on your website to increase conversions.
- **Inventory & Finance Management:** Automate inventory tracking and restocking, ensuring optimal stock levels and minimizing inventory-related challenges.
- **Invoicing and Payments:** Cash-flow is king. Automate invoicing and payment processing, streamlining your financial transactions and improving cash flow & late payables.
- **Sales & Marketing:** Automate email campaigns, sales cadences, and follow-ups, nurturing leads and engaging with customers effortlessly.
- **Social Media Posting:** Automate social media scheduling, ensuring consistent content delivery across platforms.

Some Helpful Software



For **Email Marketing Automation**, solutions like **Thryv**, **Hubspot**, and **Moosend** are some tools that can be a big help in nurturing & building relationships & getting sales from your clients.



For **Sales Automation**, especially in Business-to-Business sales - solutions like **Reply.io**, **Hubspot Sales**, and **Salesflare** can do the job (*in addition to having a CRM built in or integrations*) while having a tool like **Apollo** to get or enrich the details of prospects like e-mails and phone numbers.



Some Helpful Software



For **Invoicing & Payments**, general accounting software like **Xero** or **Quickbooks** are great - or you can have them unified or as modules in platforms like **Thryv**, **Honeybook**, and **Housecall Pro** depending on what industry you're in.



For **Ecommerce Businesses**, solutions like **Connectbooks** & **Packhelp** can help automate supply chains, data, and analytics processes and directly integrate with **Quickbooks**.



Part 3: Prioritizing your Projects



Where the heck do I start?

To maximize the benefits of automation, it's crucial to understand your business needs and prioritize areas that would benefit most from automation.

Start by identifying repetitive tasks that consume significant time and resources. Look for areas where automation can reduce errors and enhance customer experiences.

Conduct a thorough evaluation of your business processes and choose automation tools that seamlessly integrate with your existing systems.

You can also work with a Digital Adoption Agency like [Rehash Digital](#) that can help you map this out with frameworks that can help identify these areas quickly, and also potentially find grant funding to help fund these projects like **CDAP in Canada**.

Conclusion



Automation Augments, not Replaces

A big underlying takeaway in this chapter: Remember that **automation is not about replacing human effort** but about **empowering your team** and business to reach new heights of efficiency and productivity.

By automating processes and leveraging the right tools, you can **focus on innovation, growth, and nurturing customer relationships.**

Embrace the power of automation to streamline your business operations and witness the transformative impact it can have on your small business's success. Onwards to Chapter 3, where we explore the significance of a compelling business website in today's digital landscape!

Web Presence 101

Control your Online Brand



Unleash the power of your website! Discover why it's crucial for small business owners to have an online presence. This chapter reveals how a well-crafted website can drive sales, boost efficiencies, and enhance customer experiences. Learn the best practices for creating an engaging website that captivates your audience and elevates your brand's credibility.



Chapter 3: Websites: Your Business Resume

In today's digital age, having a compelling business website is not just an option—it's an absolute necessity for small businesses. Your website serves as a 24/7 virtual storefront, open to customers worldwide.

In this chapter, we'll explore the numerous reasons why a website is a powerful tool for small businesses. From driving sales and boosting efficiencies to enhancing customer experiences, understanding the significance of a well-crafted website is vital for your business's success in the digital landscape. Let's dive in and unlock the unparalleled advantages of having a strong online presence!

60% of your business is won or lost without you even talking to your prospects. Consumers decide that based on your website.

Part 1: Competitive Edge - The Power of a Great Website

01

Do I need to invest in my website?

In an era where consumers turn to the internet for information, products, and services, not having a website can be detrimental to your business's visibility and credibility.

02

From Calling Card to Resume

Some think of a website as a digital business card, but this is old-school thinking. Besides allowing prospects to contact you, a modern website is an extension of your business AND the quality of your work. Many consumers will decide to do business with (or not) with a company simply by what kind of information & ease of functionality their website offers.

For certain businesses, you can extend your reach beyond your physical location and tap into a global market, reaching potential customers you wouldn't have access to otherwise.

Part 2: Driving Sales and Expanding Reach

01

How to get meaningful results

A well-optimized website has the potential to drive sales and revenue growth for your small business. By showcasing your products or services, offering online purchasing options, and providing secure payment gateways, you make it convenient for customers to buy or engage with you.

02

The Sales Rep that never sleeps

Additionally, effective Search Engine Optimization (SEO) strategies can improve your website's visibility on search engines, leading to increased organic traffic and potential leads. Your website becomes a valuable sales and marketing tool, attracting new customers and retaining existing ones.

Part 3: Lower Costs & Better Customer Experience

01

How to reap efficiencies

A website can streamline your business operations and boost efficiencies in various ways. Online appointment booking systems reduce the time spent on scheduling, and contact forms simplify customer inquiries and feedback. Also, an FAQ section on your website can address common customer questions, reducing the need for repeated support calls or emails.

02

The first step to Advocacy

In terms of customer experiences, a well-designed and user-friendly website creates a positive impression of your brand. It allows customers to find information easily, navigate through your offerings effortlessly, and access customer support when needed. By integrating personalized features and engaging content, you can build lasting connections with your audience and foster loyalty

Some Helpful Resources



For **Website Creation** powered with AI, you no longer have to hire an agency. You can build a pretty robust website to your liking with tools like **10Web**, **Mixo AI**, and many others! As you create your website, consider updating or creating your logo through an AI logo tool like **Looka** where you can make a logo for free and only pay when you're happy with the result!



3 Essential Calls-to-action on your website will make sure you convert traffic at the highest rate:

Get a **Small Business Call Center Solution** like **Aircall** (which has recording & transcriptions) or **Unitel Voice**, have an **Automated Appointment** system (*if you're in the services industry*) built into platforms like **Thryv** or **Housecall Pro** and **Integrated Contact Forms or Live Chat** solutions into the same platforms above and **Hubspot** so you can keep track of all prospect & client communications.



Conclusion



Expect more and get more from your Website

As we conclude this chapter, it's evident that a website is more than just an online presence—it's an invaluable tool for driving sales, enhancing efficiencies, and delivering exceptional customer experiences.

Your website is an extension of your team, your brand, and if treated right - can be your best growth catalyst; but if neglected - can be the biggest limiting factor to your growth.

Embrace the digital landscape and invest in a compelling website to position your small business for success in the modern market. Your website will be the gateway to new opportunities, reaching customers far and wide. Onwards to Chapter 4, where we explore the power of social media as a competitive advantage for your small business!

Social Media 101

Social Media as a Competitive Advantage



Discover the true power of social media! In this chapter, discover how it's more than marketing—it builds trust and showcases your expertise. Gain a competitive edge as we guide you through crafting an engaging social media strategy that amplifies your brand's voice and fosters loyal communities. Get ready to stand out in the digital landscape and transform your business!



Chapter 4: Social Media is about Trust, Not Marketing

In the ever-evolving digital landscape, social media has emerged as a game-changer for small businesses. It's no longer just another marketing channel; it's a gateway to building trust with your audience and showcasing your expertise or brand.

In this chapter, we'll delve into the significance of social media as a competitive advantage.

Understanding how to leverage social media to engage your audience, foster connections, and establish your brand as a trusted authority is essential for your small business's growth and success. Let's dive in and unlock the boundless possibilities of social media!

Social media requires that business leaders start thinking like small-town shop owners. This means taking the long view and avoiding short-term benchmarks to gauge progress.

-Gary V.

Part 1: Building Trust and Showcasing Expertise

01

Showcase your Subject Matter Expertise

Through strategic content creation and engagement, social media enables you to build trust with your audience. Sharing **valuable information, industry insights, and customer success stories** helps establish your brand as a credible authority in your niche.

02

Connect & Build Relationships

By responding promptly to customer feedback and inquiries, you demonstrate your commitment to exceptional customer service.

Social media acts as a window into your business, **allowing customers to see the human side behind your brand**, fostering genuine connections that last.

Part 2: Crafting an Effective Social Media Strategy

01

Create a One-Page Social Strategy

To harness social media's full potential, it's essential to craft a well-thought-out social media strategy. Identify your target audience, understand their preferences, and tailor your content to resonate with them. Choose the right social media platforms based on where your audience is most active. Develop a content calendar to maintain consistency and ensure regular engagement with your followers.

02

Engage with Authenticity

Use a mix of content types, including informative articles, eye-catching visuals, engaging videos, and interactive polls or quizzes. Engage with your audience by responding to comments and messages promptly, encouraging discussions, and fostering a sense of community.

Remember, social media success is not just about the number of followers, but the quality of relationships you build with them.

Part 3: Outsource or Automate?



Social Media doesn't have to be hard or expensive

If you're just starting off and bootstrapping a business - paying hundreds of dollars to a social media or marketing agency isn't the most economical option. There are plenty of tools that can fully automate or semi-automate the process for you.

All-in-one solutions like **Thryv** have integrated social media management which amplifies your efficiency because it cuts down the steps to convert traffic to leads. Or you can use automated tools for different platforms like **Hypefury** for Twitter (or is it X now?) and consolidated solutions like **Loomly**.



Conclusion



Relationships are your Differentiator

To summarize, remember that social media is a powerful tool for small businesses to establish a competitive advantage. By building trust, showcasing expertise, and fostering meaningful connections, you can position your brand at the forefront of your industry.

Embrace the opportunities that social media offers and let it be a platform that propels your business forward by building authentic relationships. Onwards to Chapter 5, where we delve into the transformative impact of Social Proof marketing systems!

Social Proof Systems 101

Create Advocates Through Technology



Fuel your business with social proof! Learn how to double or triple your lifetime value by leveraging technology for reviews, referrals, and credibility. Unleash the power of social proof marketing systems to accelerate growth and turn customers into advocates. Get ready to propel your business to new heights with undeniable social proof!



Chapter 5: Closing the Loop with Social Proof

In the digital era, social proof has become a driving force behind consumer decision-making. It's no longer enough to rely solely on marketing efforts; building trust and credibility with your audience is paramount beyond just Social Media.

We'll explore how automating your ability to consistently get credit for your great work fuels your top-line revenues. We'll uncover the incredible potential of **leveraging customer reviews, referrals, and trust signals to accelerate growth and inspire confidence in your brand**. Let's dive in and discover the remarkable power of social proof marketing systems!

Social proof is the trust factor that can turn a curious browser into a confident buyer.

Part 1: The Significance of Social Proof for Growth

01

Showcase your Subject Matter Expertise

In a world filled with too many choices, scammers, and unethical businesses - **consumers seek reassurance before making purchasing decisions**. Social proof acts as that reassurance, influencing potential customers to trust your business.

02

What is Social Proof?

Positive reviews, testimonials, and user-generated content create a sense of authenticity and reliability, giving new customers the confidence to try your products or services. Social proof validates your value proposition and sets you apart from competitors, giving you a competitive advantage in the market.

Part 2: Leveraging Customer Reviews and Testimonials

01

Transparency & Credibility

Customer reviews and testimonials are invaluable assets for your business. Encourage satisfied customers to share their experiences and feedback through reviews and testimonials. Display them prominently on your website, product pages, or social media channels. By doing so, you demonstrate transparency and build credibility.

02

Be Active, Proactive, and Professional

Address any negative reviews promptly and professionally, showing your commitment to customer satisfaction. Embrace the power of customer feedback to continuously improve your offerings and showcase your dedication to quality. You can automate this with all-in-one solutions like **Thryv** or a standalone solution like **NiceJob**.



Part 3: Trust Signals and Influencer Marketing

01

It's time to brag! Don't be shy...

Incorporate trust signals like awards, certifications, and partnerships to reinforce your brand's credibility. Trust signals highlight your achievements and affiliations, assuring customers of your reliability and expertise.

02

Engage with Thought Leaders

Additionally, consider influencer marketing as a way to tap into social proof from industry experts and influencers. Influencers can amplify your brand message, reach new audiences, and generate valuable social proof through their endorsements.

This is not a fit for every industry or business model, but worth considering nonetheless.

Conclusion



Don't leave money on the table

As we conclude this chapter, think about why some of the traffic or leads you get don't convert. Do you have enough credibility showcased to build trust?

Remember that social proof marketing is not just about persuading customers; it's about building authentic connections and instilling confidence in your brand. It's the sale before the sale, and word-of-mouth & referrals should be actively and consistently managed or else you're never going to get the return on your sales & marketing spend.

Don't underestimate the power of social proof to ignite growth, win customer trust, and foster brand loyalty. Social proof is the driving force behind customer decision-making, and by leveraging it effectively, you can position your small business for remarkable success.

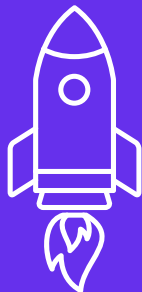
Conclusion - Put Learning to Action

Empower your Small Business with Technology

Throughout this ebook, we've delved into the transformative potential of technology for small businesses. From strengthening customer relationships with CRM to embracing automation for efficiency, and creating a powerful online presence with websites, we've covered it all.

Social media has been revealed as a competitive advantage, while social proof emerged as the fuel for growth. With these insights and strategies in hand, you're equipped to propel your business forward confidently. Embrace technology as your ally, and let it drive your success to new heights.

Your small business's future is brighter than ever before. Here's to your thriving journey ahead!





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