Tech Essentials Toolkit

A practical guide for small business leaders

Length: 10–15 minutes to skim. Keep it handy as you roll out changes.

How to use this guide

1. Pick one area this week. Ship a first version in 30 minutes.
2. Use the starter checklists. Avoid buying overlapping tools.
3. Revisit monthly. Add one improvement at a time.

1) Your Website Is the Hub

Your website is the destination people visit after seeing a post, card, or QR code. It should load fast, look credible, and capture leads.

Recommended options

- **Squarespace**. Polished and straightforward DIY option. Built-in SEO and forms. Ideal for small businesses seeking speed and ease.
  https://www.squarespace.com
- **WordPress**. Flexible and powerful with plugins like **Yoast SEO**. Best when you need control, custom layouts, or integrations.
  https://wordpress.org
  https://yoast.com/wordpress/plugins/seo/
- **Shopify**. Commerce-first. Ideal for online product sales, this solution handles payments, inventory, and checkout.
  https://www.shopify.com

Other Website Tools and Services We Love

- **10Web.io**. AI-powered WordPress hosting and automation. Speeds up site setup,

Contact Outcome Engine

Mireya Herrera | Co-Founder & Operational Strategist | Mireya@outcomeengine.io | 505-204-6637
Kanani Voegeli | Co-Founder & Growth Strategist | Kanani@outcomeengine.io | 480-580-3697
Nick Voegeli | Technical Strategist | Nick@outcomeengine.io | 480-540-6643

backups, and security.
https://10web.io

- **SiteGround**. Reliable hosting with strong support and performance for WordPress and other platforms.
https://www.siteground.com
- **Google Analytics.** Free analytics for tracking visitor behavior, traffic sources, and conversions.
https://analytics.google.com

Website Starter checklist

- Choose the right tool for you (Squarespace, WordPress, Shopify, etc.)
- Pick a clean template. Add your logo, brand colors, and a single clear call to action.
- Create one high-intent page. Include what you do, who it is for, one proof point, and a contact or signup form.
- Add a **Lead Capture** section near the top. Offer a simple resource or checklist that solves a common problem.
- Connect your form to your CRM. See the next section.
- Install **Google Analytics** and **SEO** tools to improve findability and track success

Avoid

- Buying plugins before you define the goal.
- Spinning up multiple sites or domains without a plan for content and analytics.

2) CRM = Your Business Brain

A CRM (customer relationship manager) stores contacts, tracks interest, and automates follow-up. Start light. Grow into advanced features.

Recommended CRMs

- **HubSpot**. Strong free tier. Forms, email, simple automations, pipeline.
https://www.hubspot.com
- **Zoho**. Broad feature set at a lower price. Good when you want an all-in-one suite.

https://www.zoho.com

- **Mailchimp**. Email-first with simple CRM features. Good for newsletters and basic journeys.
  https://mailchimp.com
- **Constant Contact**. Solid for email and events with straightforward templates.
  https://www.constantcontact.com

Where it fits your strategy

- Centralize every lead from forms, events, and QR codes.
- Segment by interest. Send relevant messages. Track replies and clicks.
- Automate meeting bookings straight into your pipeline.
- See a pipeline at a glance. Know what to do next.

Starter checklist

1. Create a **Contacts** list and one **Pipeline** with three to five stages. Example: New lead → Qualified → Proposal → Won.
2. Build one **Form** with name, email, and one interest dropdown.
3. Create a **Three-Email Nurture**. Welcome. Problem and quick win. How to work with us.
4. Turn on **Notifications** for new submissions so follow-up never stalls.

Starter board

- One board with lists: **Lead** → **Deal** → **Project** → **Invoice**. Move cards left to right. Attach forms, files, and due dates.

Pro tip

- Before you buy add-ons like chat or booking, check if your CRM includes them. Avoid duplicate subscriptions.

3) Lead Capture Flow

Mireya Herrera | Co-Founder & Operational Strategist | Mireya@outcomeengine.io | 505-204-6637
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Turn interest into a contact with a clear path.

Starter flow

QR code → Landing page → CRM form → Instant thank-you page → Automated email with your resource.

Tools

- **QR codes:** Built-in from your design tool or free generators.
- **Landing pages:** Your site builder or your CRM's page tool.
- **Forms and automation:** Your CRM.

Starter checklist

- Create a landing page with one message, one offer, and one form.
- Write a short thank-you page that confirms the action and sets the next step.
- Build an automated email that delivers the resource and invites a call or booking.
- Test the full path on mobile. Submit yourself from both your phone and desktop, and once from a teammate's phone.

Avoid

- Asking for too much data up front. Name and email are enough for the first contact.

4) Email Marketing and Automations

Email keeps you top of mind and scales your time.

What to send

- Welcome series for new leads.
- Monthly tip or FAQ that solves one specific problem.
- Simple offers with a clear expiration.

Starter checklist

- Write three short emails. 120–180 words each. Plain language. One link.

- Create segments for two or three interests based on your form responses.
- Schedule the series. Review your open and click data after each campaign and on a monthly basis.

Helpful tools

- HubSpot Workflows. Zoho Journeys. Mailchimp Customer Journeys. Constant Contact Automation.
- **Warmup Inbox.** Helps improve deliverability by gradually increasing your sending reputation.
  https://warmupinbox.com

5) Operations and Productivity

Keep internal work visible and simple. Reduce double entry.

Communication

- **Slack**. Fast team chat and channels.
  https://slack.com
- **G-Suite (Google Workspace).** Email, docs, sheets, and calendar for collaboration.
  https://workspace.google.com

Project management

- **Trello**. Simple boards and checklists to coordinate projects across teams
  https://trello.com
- **ClickUp**. Flexible all-in-one tasks, docs, and dashboards.
  https://clickup.com
- **Asana**. Clear timelines and workflows.
  https://asana.com

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Other essentials

- **Loom.** Record quick video walkthroughs for clients and teammates. Great for asynchronous communication.
  https://www.loom.com
- **Figma.** Collaborative design tool for UI, websites, and branding.
  https://www.figma.com
- **Gusto.** Simple payroll, benefits, and HR for small businesses.
  https://gusto.com
- **Everysign.** Great tool for capturing digital signatures quickly and securely.
  https://everysign.com

Integrations that save time

- **QuickBooks Online** with
  - Your CRM for tracking invoices, deal stages, and revenue impact by customer or campaign.
  - **Gusto**: Smooth handoff between payroll and accounting.
    https://quickbooks.intuit.com
- **Forms** → **Tasks** in your PM tool using built-in automations or **Zapier** and **Make**.
  https://zapier.com
  https://www.make.com

Avoid

- Maintaining multiple PM tools at once.
- Letting tasks live in email.

6) AI as a Helper

AI accelerates drafts and checklists. Keep a human in the loop.

Use cases

- Draft or polish emails in your tone.

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- Summarize meetings and pull action items.
- Outline SOPs and QA checklists you can refine.

Recommended Tools

- **ChatGPT.** Versatile AI assistant for drafting, brainstorming, research, and automation prompts.
  https://chat.openai.com
- **Claude.** A conversational AI assistant built for fast drafting and reasoning.
  https://claude.ai

Helpful webinars to learn how to use AI

- How AI Can Support Learning, Research, and Creativity
- Next-Level AI: Avoiding Pitfalls and Unlocking Everyday Efficiency

Guardrails

- Do not paste sensitive or confidential data without a paid account.
- Rephrase details if needed.
- Always treat any output as a first draft. Edit for accuracy and voice.

7) When to Build Custom Software

If off-the-shelf tools force daily workarounds, consider a lightweight custom layer.

Signals it is time

- You pay for features you don't use, yet key steps still occur in spreadsheets.
- Your staff re-enters the same data in multiple places.
- Reporting takes hours instead of seconds.
- You can’t find anything off the shelf that meets your specific needs
- You see a growth opportunity for your business

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Common wins

- Reporting dashboards for real-time visibility.
- Customer-facing mobile apps for status and self-service.
- Internal tools with AI checks to reduce errors.

Approach

- Start with the smallest app that removes one painful step. Integrate with your current stack. Expand only when it proves value.

Which Technology Should You Build?

Choose a Website Builder If:

- You need a simple website quickly and affordably
- You don't require complex functionality
- You want to keep hosting and maintenance costs to a minimum

Choose a Web App If:

- Your business needs interactive features like user logins, dashboards, or automation.
- You want software that runs in a browser without requiring a mobile app.

Choose a Mobile App or PWA If:

- Your business relies heavily on mobile users and engagement (e.g., fitness tracking, social networking, loyalty programs)
- You need offline functionality or push notifications to interact with customers
- You want to provide an app-like experience without requiring users to download an app (PWAs are great for this)

Choose Custom Web Software If:

- Your business requires advanced features, integrations, or automations
- You need a scalable solution that can grow with your business
- You want full control over your website's design, performance, and data

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What Do You Need Your Technology to Do?

	Websites	Web Apps	PWAs	Mobile Apps	Custom Software
Best For...	Sales & Digital Marketing	Interactive tools & dashboards	Mobile-like web experience	Advanced mobile needs	Complex & scalable solutions
Works in a Browser?	✅ Yes	✅ Yes	✅ Yes	❌ No	✅ If Developed
Requires Download?	❌ No	❌ No	❌ No	✅ Yes	❌ Rarely
Works Offline?	❌ No	❌ No	✅ If Developed	✅ Yes	✅ If Developed
Push Notifications?	❌ No	❌ No	✅ Yes *iOS Limits	✅ Yes	✅ If Developed
Mobile Optimized?	✅ Yes	✅ Yes	✅ Yes	✅ Yes	✅ If Developed
Custom Features?	❌ Limited	✅ More Flexible	✅ Limited to Web Features	✅ Fully Customizable	✅ Fully Customizable
Development Cost?	$ Low	$ $ Medium	$ $ Medium	$ $ $ High	$ $ $ High
Maintenance Required?	🔹 Low	🔹 Medium	🔹 Medium	🔹 High	🔹 High

8) Data and Security Foundations

Protect access. Prepare for hiccups. Keep things updated.

Backups and storage

- **Use Google Drive** or **OneDrive** for shared files and version history.
  https://drive.google.com

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https://www.microsoft.com/microsoft-365/onedrive

Access control

- **1Password** or **LastPass** for secure password sharing and unsharing.
  https://1password.com
  https://www.lastpass.com
- Turn on **Two-Factor Authentication** for email, banking, and your CRM.

Everyday safety

- Email is not secure. Never share passwords by email.
- If something looks off, take a screenshot and ask AI if it is a scam.
- Always update your devices, software, plugins, and apps. Set updates to automatic.

Starter checklist

- Choose one password manager. Invite your team. Create shared vaults by role.
- Turn on 2FA for your email and CRM today.
- Document how to remove access when staff or contractors leave.

9) Budget and Planning

Start simple. Avoid lock-in. Review monthly.

Early stage

- Website. One CRM. One PM tool. Basic email sequence.

Growth stage

- Connect accounting. Add automations. Build a simple dashboard.

Quarterly review

- Top three time drains. One new automation per quarter. One cleanup day per month.

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10) Vendor Checklist

Use this when evaluating any tool.

- What problem does it solve right now?
- Must-have features vs nice-to-have.
- Total annual cost. Add expected users.
- Existing overlap with your current tools.
- Exit plan. How to export data if you switch.
- Security basics. 2FA, user roles, and audit trail.

Quick Start Recipes

A. Launch a lead capture in 30 minutes

1. Create a landing page with a clear headline, three key points, and a single form.
2. Connect the form to your CRM list.
3. Write a single welcome email with your resource link and one next step.
4. Print a postcard or one-sheet with a QR code that points to the landing page.

B. Stand up a simple pipeline

1. Create stages: New lead. Qualified. Proposal. Won.
2. Add one required field per stage. Example: decision date.
3. Review every Monday. Move or close anything older than 30 days.

C. Turn form submissions into tasks

1. In your CRM, connect to Trello, ClickUp, or Asana.
2. Map fields to the task title and description.
3. Auto-assign to the owner. Add a two-day due date.

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Glossary

2FA (2-Factor Authentication). A second step to verify login, like a code from an app.

Automation. A rule that triggers emails, tasks, or updates based on digital "events."

CRM (customer relationship manager). System for storing contacts and tracking interactions.

Custom Software. A fully bespoke web or mobile solution built from scratch for specific business needs, offering complete control, scalability, and integration.

Hybrid Approach. Using a mix of website builders, web apps, PWAs, or custom software to cover different stages of growth or functionality.

Mobile App. Software downloaded from app stores, built specifically for iOS or Android. Provides offline use, notifications, and deeper device integration.

Pipeline. Stages that show where a deal or project is in your process.

Progressive Web App (PWA). A web-based app that behaves like a mobile app, offering offline use and push notifications, without requiring a download.

Scalability. The ability of a system or tool to grow with your business without requiring a complete rebuild.

System Integration. Connecting different software platforms so data flows automatically between them.

Web App. Interactive, browser-based software that users can log into and use without downloading. Ideal for dashboards, portals, and automation.

Website Builder. Platforms like WordPress, Shopify, or Kajabi enable you to create a website quickly, complete with pre-built themes, plugins, and hosting.

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Links and Resources

Website Resources

- Squarespace: https://www.squarespace.com
- WordPress: https://wordpress.org
- Yoast SEO: https://yoast.com/wordpress/plugins/seo/
- Shopify: https://www.shopify.com
- 10Web.io: https://10web.io
- SiteGround: https://www.siteground.com
- Google Analytics: https://analytics.google.com

CRM Resources

- HubSpot: https://www.hubspot.com
- Zoho: https://www.zoho.com
- Mailchimp: https://mailchimp.com
- Constant Contact: https://www.constantcontact.com
- Warmup Inbox: https://warmupinbox.com

Communication Resources

- Slack: https://slack.com
- Google Workspace (G-Suite): https://workspace.google.com

Project Management Resources

- Trello: https://trello.com
- ClickUp: https://clickup.com
- Asana: https://asana.com
- Loom: https://www.loom.com
- Figma: https://www.figma.com

Operations Resources

- Gusto: https://gusto.com

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Everysign: https://everysign.com
- QuickBooks: https://quickbooks.intuit.com
- Zapier: https://zapier.com
- Make: https://www.make.com
- Google Drive: https://drive.google.com
- OneDrive: https://www.microsoft.com/microsoft-365/onedrive
- 1Password: https://1password.com
- LastPass: https://www.lastpass.com

AI Resources

- ChatGPT: https://chat.openai.com
- Claude: https://claude.ai
- Webinars:
  - https://outcomeengine.io/how-ai-can-support-learning-research-and-creativity/
  - https://outcomeengine.io/next-level-ai-avoiding-pitfalls-and-unlocking-everyday-efficiency/
- Gemini – Google's AI assistant with deep web integration and multimodal capabilities. https://gemini.google.com/
- Copilot – Microsoft's AI is integrated into Office and Windows for productivity. https://copilot.microsoft.com/

Next step

Book a one-hour working session. We will map your stack, identify your first three improvements, and provide a three-week plan for execution.

Book Your Session

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