# Essential Tech for Running Your Small Business

**Business tools can be helpful for:**

- Completing rote tasks more quickly with templates and workflows
- Consolidating, backing up, and safely storing client information
- Securely storing and organizing files for sharing and collaboration
- Setting alerts and reminders to avoid missed deadlines

**Tools for:**

- Productivity Bundles: Business plans have more storage and AI assistants
  - Google Workspace for Business, Microsoft 365 for Business



- File Management: Securely store and share files; easily delegate tasks
  - Google Drive, OneDrive, iCloud, Dropbox, Box



- Accounting/Bookkeeping: Generate reports, organize records for tax time
  - Quickbooks Online, Xero, Zoho Books, Freshbooks



- Scheduling: Send reminders, avoid double bookings, and post policies
  - Calendly, Mindbody, Vagaro, Fresha, Square Appointments



**Tips for Choosing Software**

- Consider your business type/size.
- Determine what functions you need.
- Start with a free trial.
- Opt for good customer support.

**Additional Resources**

- Score.org
- Nerdwallet Small Business Tools
- Senior Planet's Small Business Page

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