

Finding the right apps

for your small business

Andrew Erkins, Founder of Digit

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Have a look at your phone –

1. How many apps do you have installed?
2. How many do you actively use each week?



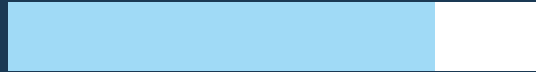
What do the stats say?

0.05s



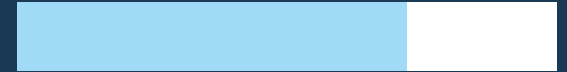
The amount of time it takes for someone to make a snap judgement of you on your website

74%



Of people are likely to switch brands if they find the purchasing process too difficult (Salesforce)

70%

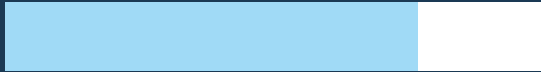


People prefer digital payment options to pay one time bills (ACI)

d1g1t

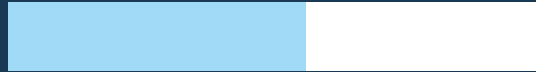
What do the stats say?

82%



Of consumers expect an immediate response to sales or marketing questions

67%



Of customers prefer self-service over speaking to someone

What do these trends mean for business?

What is digital transformation?

Digital transformation is the integration of digital technology into all areas of a business, fundamentally changing how you operate and deliver value to customers



Arguably it's more than that – it's about understanding that adopting technology within a business requires cultural change as well – a shift towards ongoing experimentation and innovation

We saw during COVID that businesses could adapt – using Zoom for example. We learnt that working from home was ok.

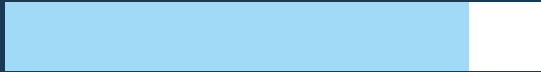
And we learnt a new set of rules in how that tech changed our lives.

Digital transformation is both tech and people together



The changing digital landscape ...

89%



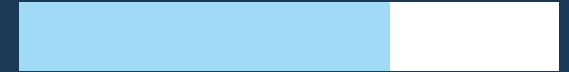
Of companies have adopted a digital-first business strategy (IDC)

21%



Believe they have completed their digital transformation (Forrester)

70%



Of businesses have a multi-cloud approach and prefer connecting different platforms (Gartner)

This is the main trend in small business – using different cloud-based apps/services to solve specific problems, and connecting those apps together



Common digital terms ...

The Cloud

scalable on-demand services
accessed over the internet

you might hear things
described as -
'cloud-based'

SaaS

Software as a Service

software that is cloud-based that
you generally pay a subscription
fee to use (PAYG)

API

important for connecting
apps

Application Programming Interface

A simplified and defined way for
other systems to connect to, and
interact with an app

Cloud Integrators

People who connect and configure
apps to talk to each other

Legacy Software

Old systems and software that still
perform a role but could be
replaced

 **dryrun**

 **CIN7**

 **BUILDERTREND**

Dext | Prepare
with Receipt Bank

afterpay 

 **DEPUTY**

Workflow **MAX**
a xero product

 **Fathom**

vend 

 **UNLEASHED**

 **Stitch**

debtor  **daddy**

calxa 

stripe

 **FUTRLI**

HARVEST



simPRO 

AroFlo

 **SERVICE8**

CHASER

 **helm**

Revel

 **Benchmarking**

 **ApprovalMax**

 **float**

 **LEAP**

 **Figured**

 **Square**

 **shopify**

DEAR
INVENTORY

 **lightspeed**

 **tradegecko**

 **ReceiptBank**

GO CARDLESS

Where do you start?

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Figuring out what you do

With a **task audit**. A log of tasks someone does, and how long it took – recorded over a fixed period of time

It ensures you completely capture what takes place within a business, while also helping identify opportunities

It flags where an app or automation might impact a person – and help with change management



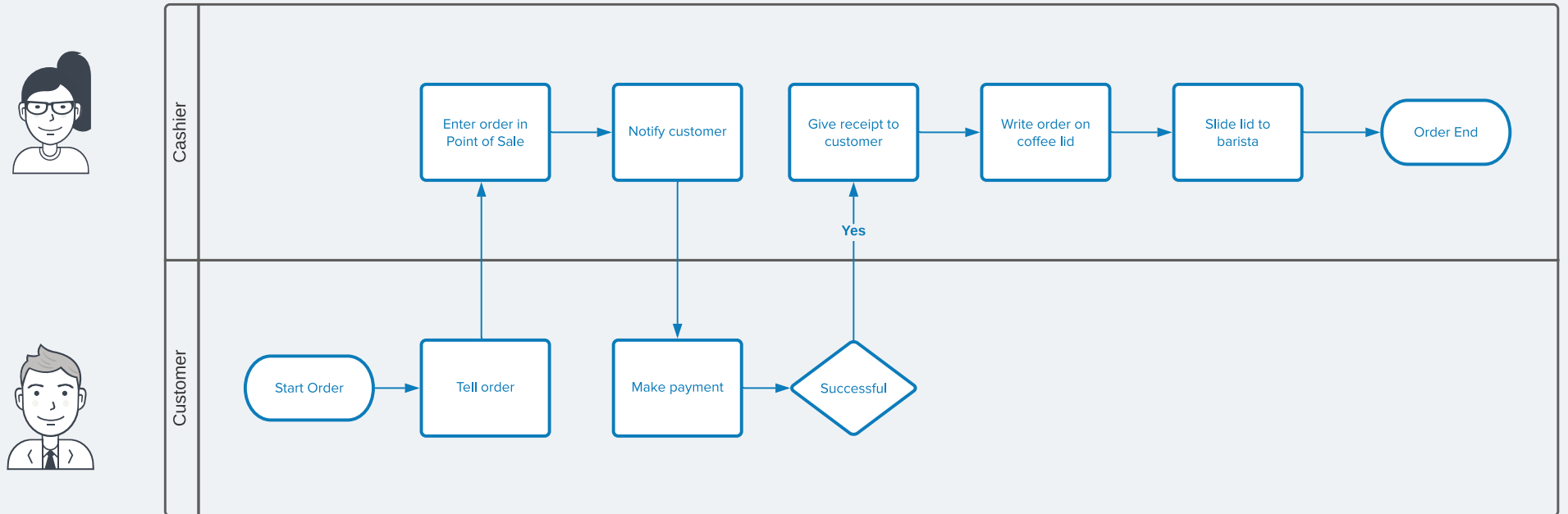
cashier

| Task | Time (min) |
|------------------------------------|------------|
| Open the til | 5 |
| Check the float | 5 |
| Enter order in Point of Sale | 210 |
| Process payment | 108 |
| Print and give receipt to customer | 22 |
| Write order on lid | 28 |
| Pass the lid along to the barista | 10 |

→ tell me more!

Figuring out how you do it

With a **process map**. A diagram that illustrates the flow of a process, and the various steps along the way



Use post-its

→ A lowfi and effective way to quickly map things out in a business. You can shuffle steps around, add new ones in, and quickly visualise a process

d1g1t






Figuring out what you want to do ...

User stories are a way to capture the who, what and why in an informal way.

They are used in agile software development

It's not necessary to put the 'so that' but asking the question of 'why' does help qualify for someone the value in the thing they want

As a  I want  so that 

As a manager I want to **approve all expenses over 5,000** so that I can control cashflow

As a bookkeeper I want to **attach source documents to all transactions** so the context is there for our accountant

As a bookkeeper I want to **automate the entry of bills in Xero** so I can spend time doing better things

Create a shopping list

| Requirement | Kounta (Lightyear) | Square |
|---------------------------------------|--------------------|--------|
| Process sales | ✓ | ✓ |
| Store common ordered items | ✓ | ✓ |
| Hospitality specific | ✓ | ✓ |
| Runs on an ipad | ✓ | ✓ |
| Accepts card payments on mobile | | ✓ |
| | | |
| Talks to my accounting platform (API) | ✓ | ✓ |
| Cloud based | ✓ | ✓ |

→ Non negotiable

Power-up with connected apps

Find and connect beautiful apps for your business

Every business needs an accounting system, so one place to start your app research is with the app marketplaces of accounting apps.



Search

Staff picks

[See all >](#)

 **PRACTICE Ignition**

Invoicing and jobs, Practice manager

Practice Ignition

★★★★★ 363

Practice Ignition eliminates the friction by sending your clients a single, smart proposal they can read, sign and pay in one place. That's more closed deals for you...

Dext | Prepare
with Receipt Bank

Bills and expenses, Practice manager, ...

Dext Prepare

★★★★★ 806

Dext Prepare with Receipt Bank is the simplest way to get your client data into Xero! Say goodbye to chasing and data entry. Spend more time growing your business.

 **Syft**

Accountant tools, Practice manager, R...

Syft

★★★★★ 130

Reports | Graphs | Forecasts | Consolidations | Budgets | Valuations | Financial Statements | Tax | Industry Benchmarks

Dext | Precision
with Xaver

Accountant tools, Reporting

Dext Precision

★★★★★ 36

Take control of your Xero data with Dext Precision (formally Xavier); spot data anomalies, track key liabilities and prioritise your clients to take action & empower advisors...

Where do you go

- Business Associations
- Industry Groups - industry bodies, social media, peers
- App Marketplaces / Comparison sites – Xero, Capterra, G2
- Cloud Integrators
- Ask Google! Siri, Alexa ... ‘automate accounts payable’

Top questions to ask the app people ...

check off the items on
your shopping list

- can it do what I want?
- what can't it do well?
- what does it connect to?
- setup and implementation steps?
- pricing and hidden costs?

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Other things you want to know ...

Is it a native integration or need a third party? Is it a 1-way or 2-way sync between systems?

- how does it connect?
- are there limits?
- where is my data stored?
- does it work on all devices?
- what is the roadmap?

The app might not do everything you want today, but will it in the future?



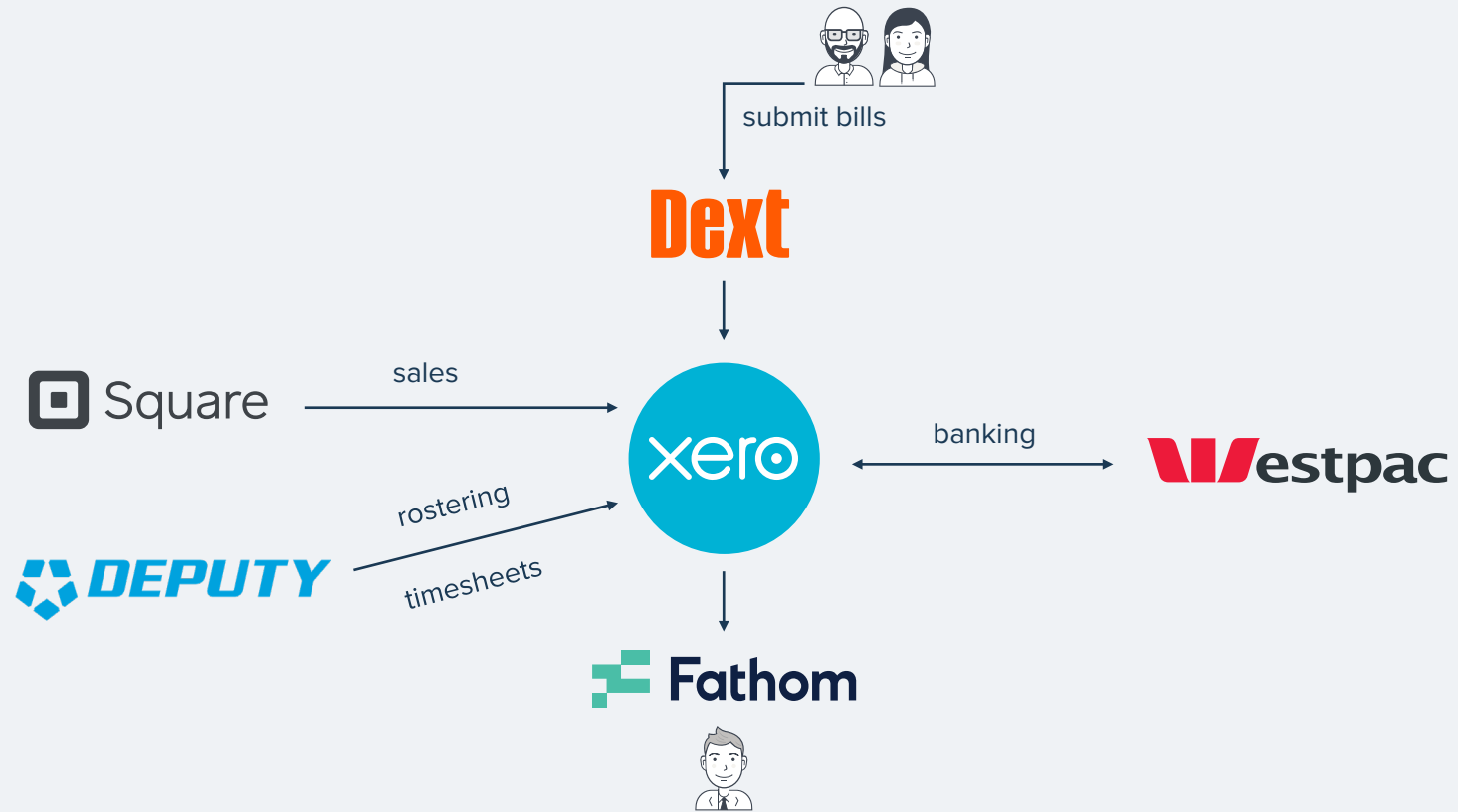
Ask for a demo,
or a show and tell

Look it's not
rocket surgery ...

d1g1t



Bringing it all together ...



Questions?

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