



The Modern Small Business Playbook



Make No Mistake: The Game Is On

You're playing for **market share**.

You're playing for **loyalty**.

You're playing for **keeps**.

No matter where you are in the digital transformation race, when it comes to beating the competition, you've got to level the playing field.

How? By modernizing your business with the **right tools** to help you get found online, stand out from the pack, get paid faster and win more customers.

TABLE OF CONTENTS

01

If You're Not Digital Yet

- Dive into your digital business
- It all starts with your customers
- Streamline communication
- Never miss another appointment
- Top 3 reasons to go digital

02

If You're Adopting Digital

- Ramp up your digital world
- Move appointment scheduling online
- Clean your online listings
- Generate more positive reviews
- Make marketing messages automatic
- Overhaul how you request and accept payments
- Choosing the right platform

03

If You're Digitally Savvy

- Make the most of your digital skills
- Social savvy — optimize your efforts
- Payment pro — more options
- All the apps in one place
- What your software should offer

01 If You're Not Digital Yet

It's Time to Dive into Digital with Your Business

When your customers move online, you need to go there, too. Business-friendly tools can make your trip smooth and simple.



It All Starts with Your Customers

The power of shifting to digital truly begins when you get your customer list organized. This is accomplished with **Customer Relationship Management** software, or **CRM** for us tech nerds. The CRM is the place you put all your customer information so you can refer to it again, send email marketing campaigns, keep track of their purchases or services and much more.

Yes, it takes time to upload all your client information into the CRM (name, address, phone number, email address, products or services sold, etc.), but once you do, you unleash a world of marketing, promotion and sales opportunities.



Name



Address



Phone Number



Email Address

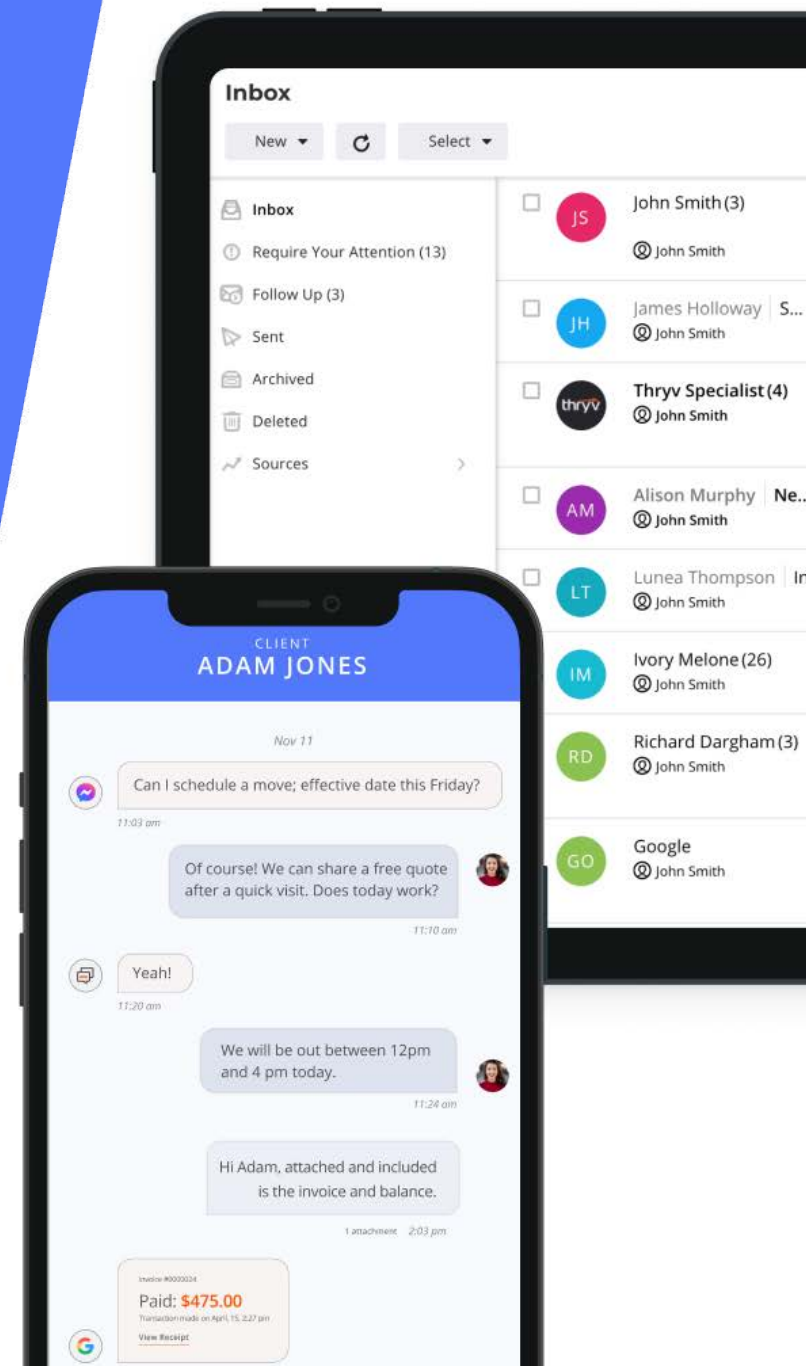


Customer Activity

Streamline Communication

With the right digital tools, you can make customer communication a million times easier. Stop playing phone tag to schedule appointments. No fumbling around between emails and texts to figure out where that one important message came from.

A powerful software platform will allow you to see all your conversations in one inbox. And because it's all in one place, your customers' messages won't fall through the cracks.





☑ Never Miss Another Appointment

Here's where going digital really starts to get exciting. No, really! If you're managing every meeting or session with your customers through phone calls, you're probably getting interrupted a lot. Answering the phone. Returning calls. Stopping everything to check your availability. Rescheduling when someone cancels.

Stop the madness!

Instead, offer online scheduling so your customers can make appointments through your website. They choose their preferred time, you get notified, they get automatic reminders that you don't have to send. Everyone's digital... everyone's happy!



Scheduling



Notification



Automatic Reminders



of consumers prefer businesses that offer both in-person and online options.¹

Top 3 Reasons to Go Digital

The world has changed. Today's customers want to know they are safe when they're doing business with you. That's where the right digital solutions will set you apart.

Let's transform how you communicate, get paid and win new customers.

LOOK LIKE A PRO

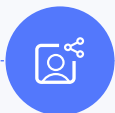
We know that when you're a one- or two-person operation, resources are limited, and you often make do with what you've got. With an easy-to-use, fully digital platform, you can create the appearance of a much larger operation with a professional appearance. Send out **polished invoices and track payments**, **create smart social media posts on multiple pages** and **deliver email marketing campaigns** like a boss. It's like hiring a marketing expert for a fraction of the cost.



Payment



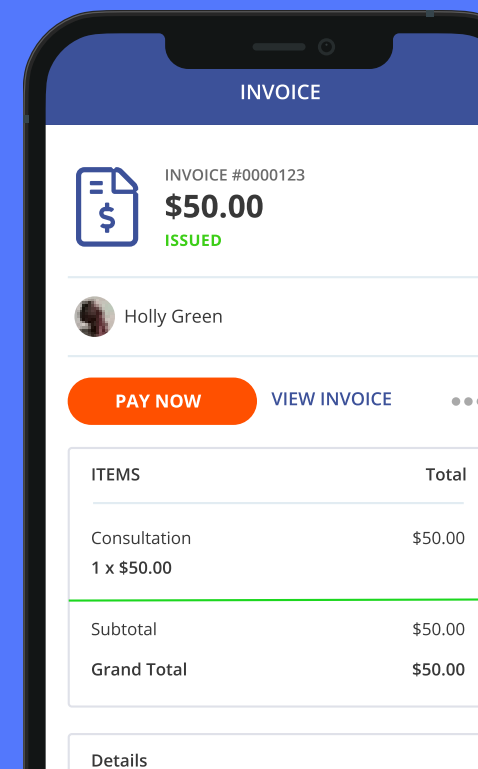
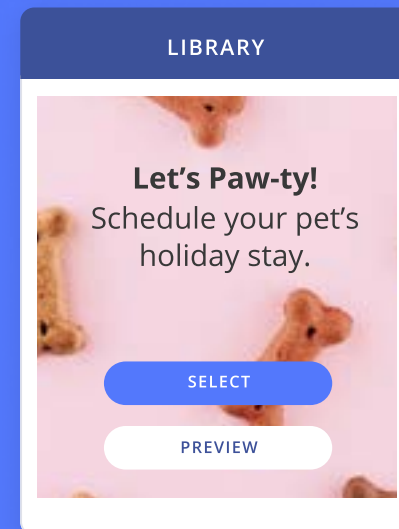
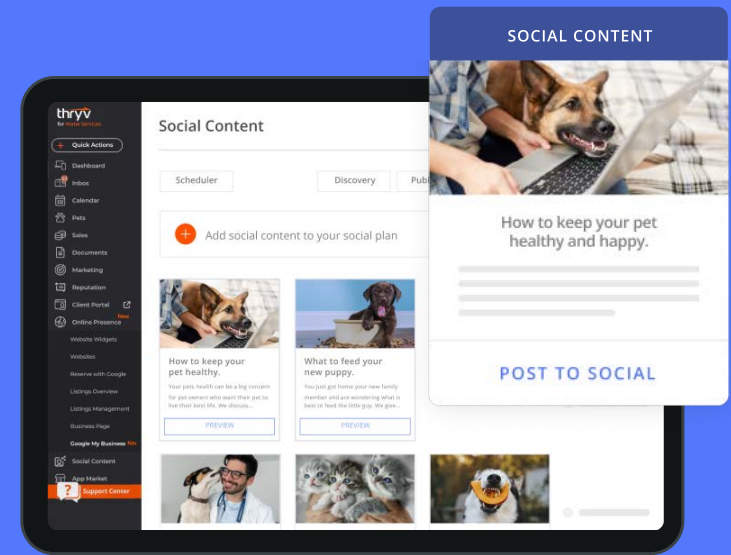
Invoice



Social Media

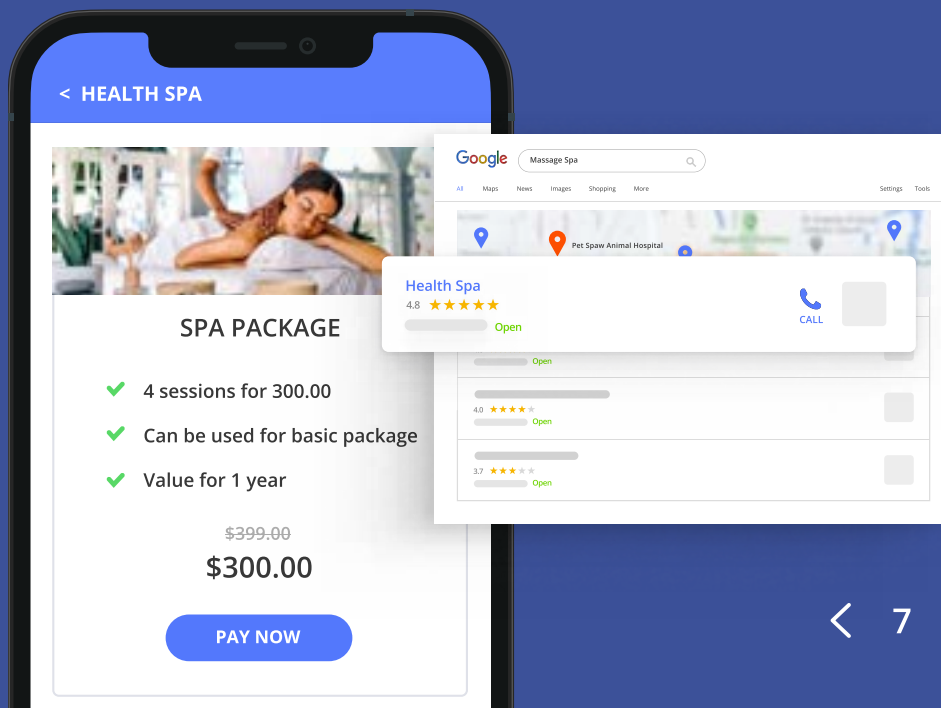


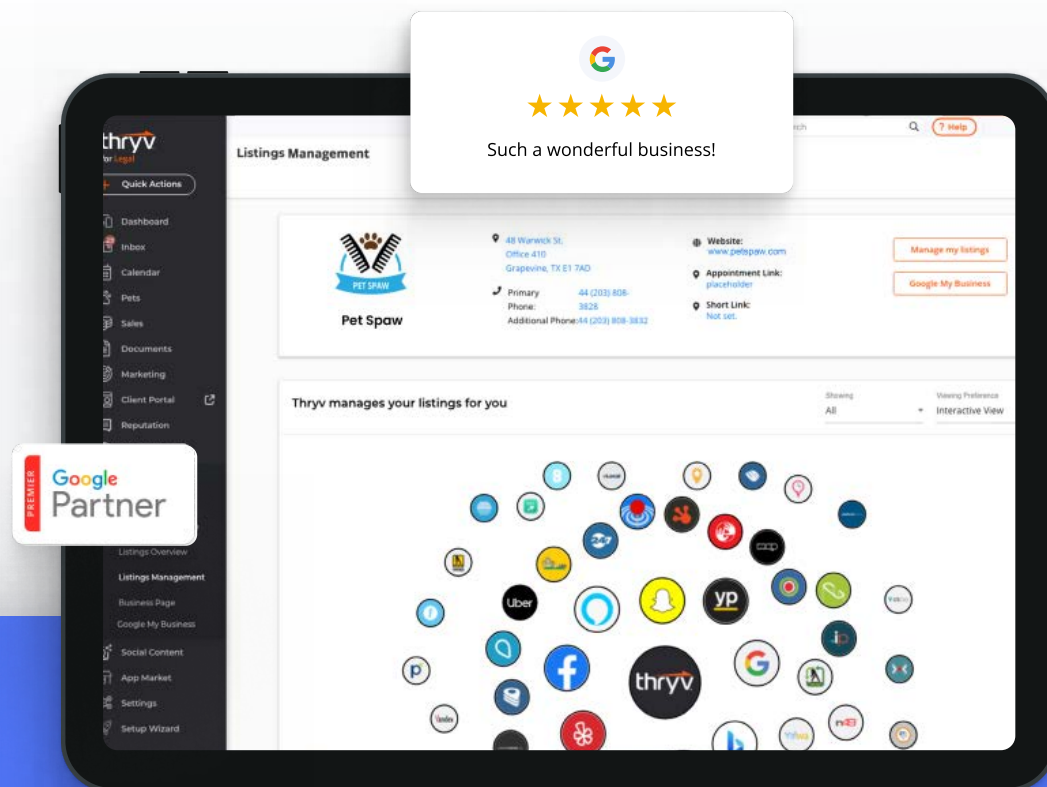
Email Marketing



😊 HAPPIER CUSTOMERS

One of the top priorities on customers' minds right now is **convenience**. They want to support local small businesses, but bigger companies are winning their business with things like text messaging and digital payments. A software program can level the playing field by allowing very small businesses the opportunity to use slick digital technology, such as **Pay by Text**, **online appointment scheduling**, **accurate business listings** across the internet and more.





★ STAR RATING

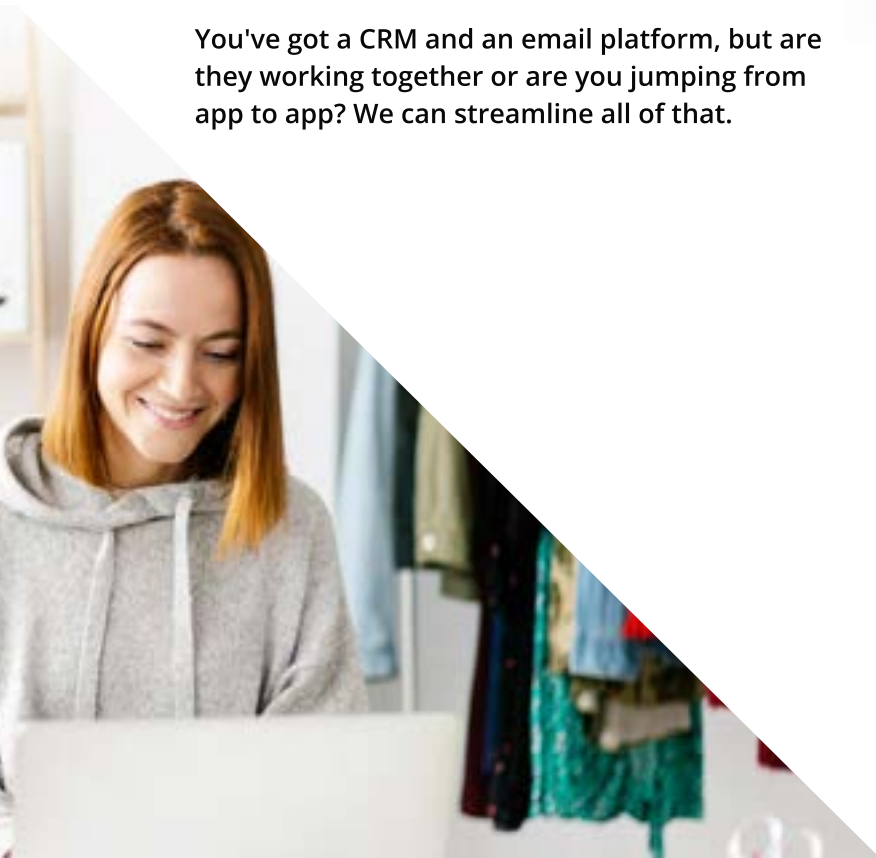
More customers than ever read online reviews, like Google reviews, before they'll visit a business. They'll almost always choose a business that has some reviews, even if they're negative, over a business that has zero reviews. With a good CRM system, texting capabilities and accurate online listings, any small business can dominate with great reviews. A software system like **Thryv** will not only allow you to request more reviews, but you can get notifications when new reviews come in, and you can respond to your customer reviews all from one dashboard.

02 If You're Adopting Digital

You've taken steps toward creating an online presence, but you're not quite there yet, and need help.

Let's Take Your Digital Journey to the Next Level

You've got a CRM and an email platform, but are they working together or are you jumping from app to app? We can streamline all of that.



You're ready for more ...

Time to Ramp Up Your Digital World

OK, grasshopper. We see you learning and trying new things with your online presence and digital capabilities. Maybe you've expanded your website, or started using an email or social media platform to streamline your efforts. Great start! Now, let's kick it up a notch.

Many small businesses use multiple apps or software programs to get the job done. What if you could combine your CRM, email, social media, payments, scheduling, marketing and even document storage all into one neat online platform?

Check out these advanced moves that can be accomplished from one dashboard and save you hours in the back office.



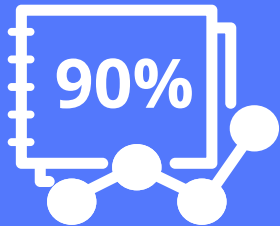
of small business owners spend up to **10 hours a week** just on administrative tasks.²

Let's Make Some More Advanced Moves

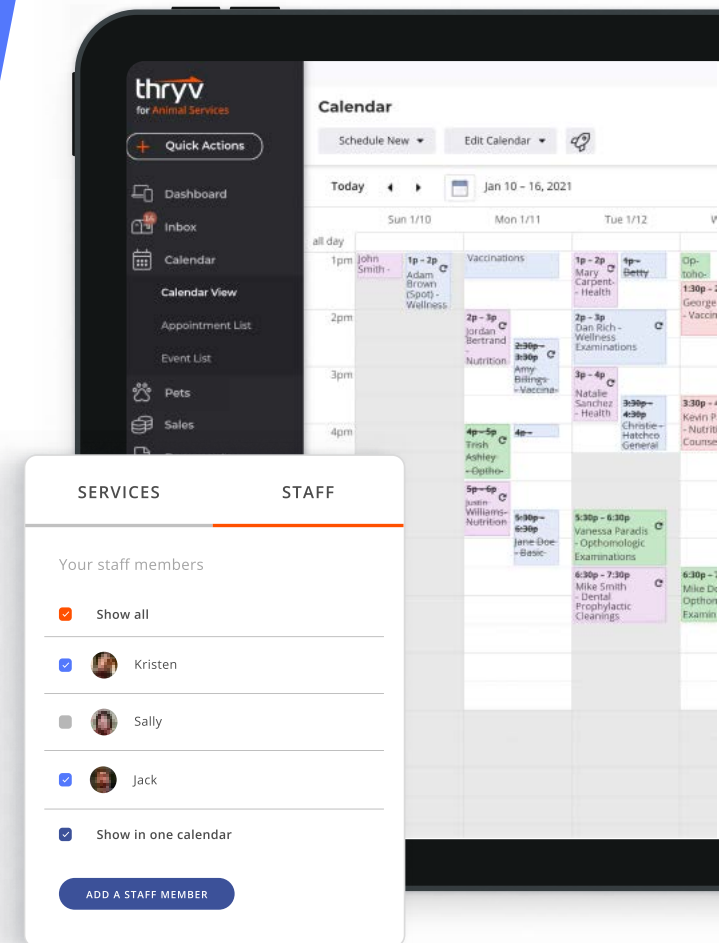
☑ Move appointment scheduling online.

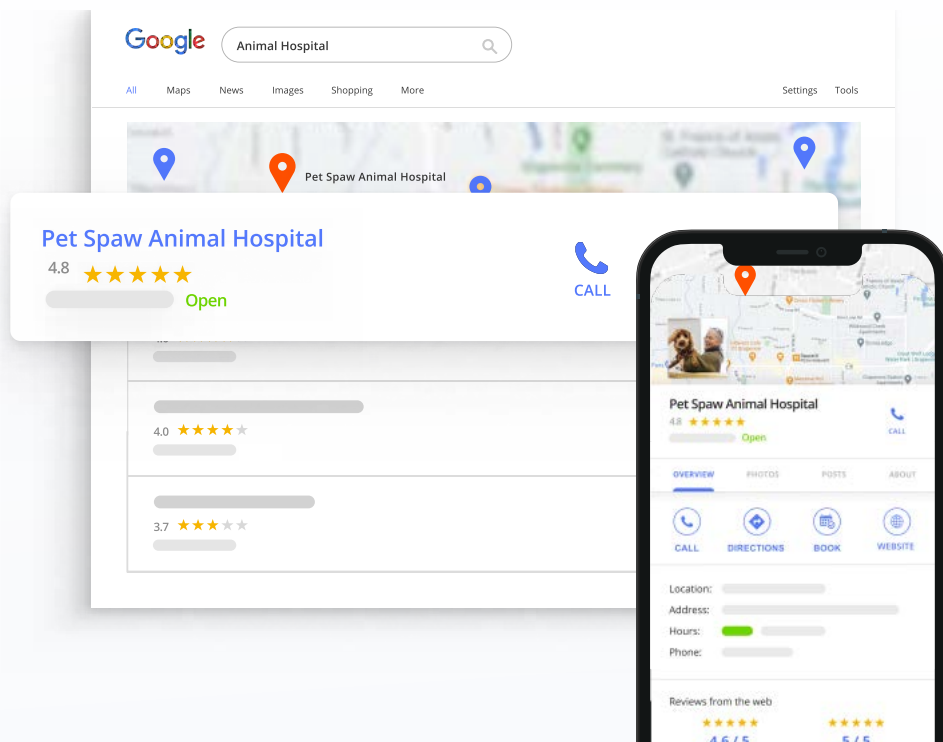
Add online booking to your website so your customers can schedule themselves during your available times. Choose a software platform that allows you to sync it with your calendar and your team's calendars so you can see everyone's schedules at a glance.

No more double bookings. No more missed appointments.



90% of Millennials book appointments through the web or from mobile devices.³





Clean up your online listings.

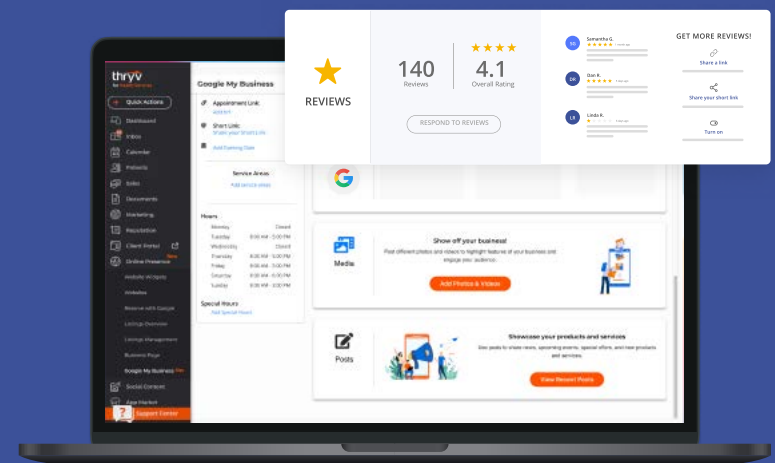
Once you step further into the digital orbit, you'll soon realize that your business is listed on several different sites — from Facebook to Yelp to Google and beyond. The ideal software platform will allow you to update your listing once, and then it automatically updates across the web, so you never have conflicting information.

This is especially critical during certain seasons when your hours or services may change regularly.

★★ Generate more positive reviews.

The next level of online listings and presence is managing your online reviews. The name of the game is to get MORE reviews, so one negative review doesn't skew your star rating. A great way to generate more reviews is to automate a message to your customers after you've finished a job for them.

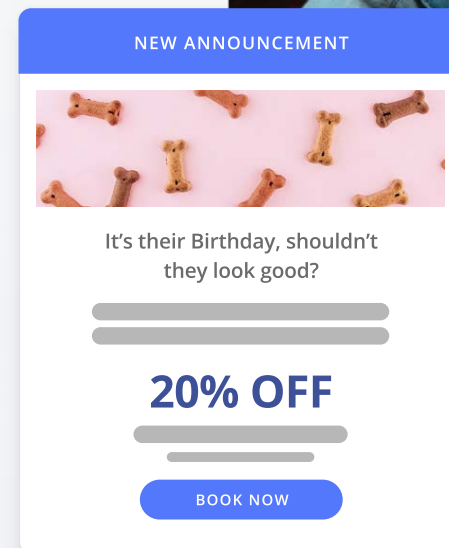
Once the job is complete, your software platform should be able to send a follow-up "thank you" and request for a review with a link that takes your customer to the reviews page. Satisfied customers won't mind sharing the good news with your prospects.

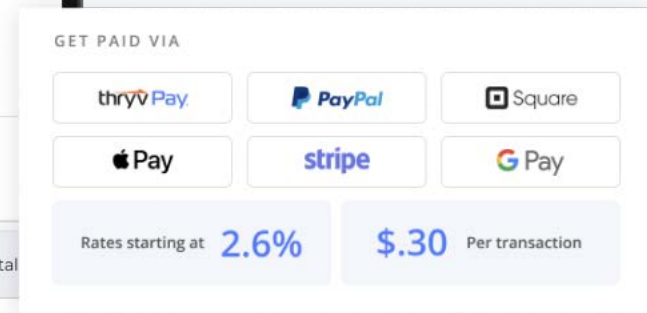
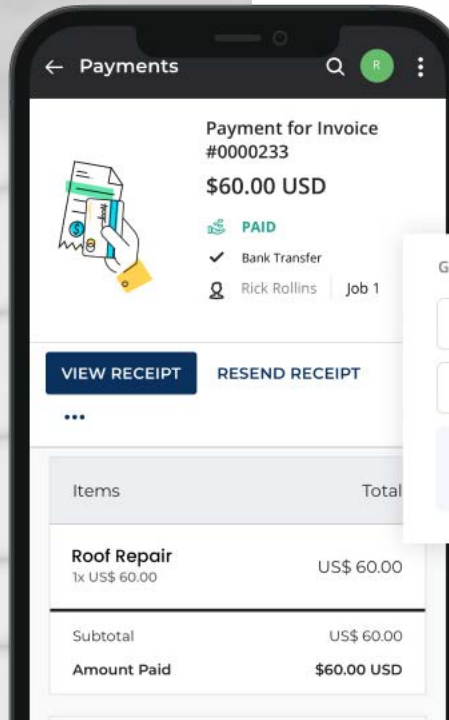


🎯 Make marketing messages automatic.

Here's where all your capabilities combine. Use your CRM and customer details to create marketing messages that get sent at the right time.

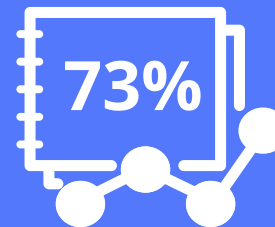
This can be anything from appointment reminders to happy birthday wishes to "we miss you" messages to get customers back in the door. Once you set up the right messages to the right customers, a robust software program will make this process seamless.





💰 Overhaul how you request and accept payments.

Now we're getting fancy! Use your system to create professional estimates and invoices, which can automatically be sent to your customers via email or even text. Providing contactless payment options for your customers should be top-of-mind. Once you securely store your customer's credit card or bank information, you can process the payment without exchanging cards or checks by hand.



of consumers say that when comparing two businesses, the type of payment options available will influence their final decision.⁴

Choosing the Right Platform

Here are 3 ways to determine if the software you're considering is right for your business. Does it satisfy your needs now and will it grow with you in the future?

1. Determine Needs

Which features do you need right now? An email platform? A payments processor? Online scheduling? Make a list!

2. Integrate Favorites

If you have apps you don't want to give up, like Quickbooks, does the software integrate with them?

3. Grow With It

Will the platform allow you to add more customers, offer additional features, expand with you as you grow?



Take your small biz to the next level and
download your full action plan now.

[GET THE CHECKLIST](#)

03 If You're Digitally Savvy

You've mastered most of the digital transformation, and you're ready to take it to the next level.

Make the Most of Your Digital Skills

Your digital prowess makes all these tools easy for you, and can make doing business easy, too.

3 Ways to Amp Up Your Business

You have the technology at your fingertips to run a smarter, more streamlined business

SAVVY SOCIAL

Optimize Your Social Media Efforts

The right software can help you get the most out of every post.

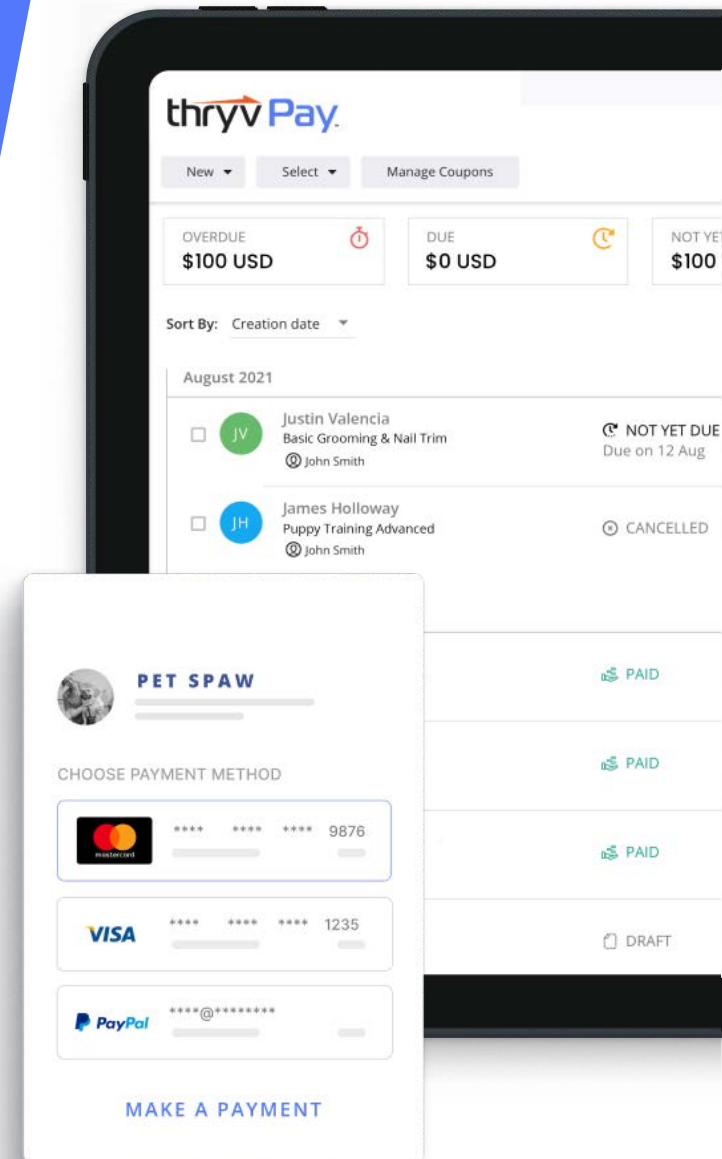
- ✓ Pre-schedule posting plans.
- ✓ Pre-loaded image and content library.
- ✓ Social media advertising plan.
- ✓ Peak posting times.
- ✓ Calendar view.
- ✓ Connected to your favorite channels.
- ✓ Client data enrichment search through social channels.

PAYMENT PRO

More Options for You & Your Customer

Use a payment program built specifically for small businesses.

- ✓ Packages and partial payment set-up.
- ✓ Credit or ACH options.
- ✓ Estimate and invoice templates and form-builders.
- ✓ Pay by SMS text for fast, convenient, contactless payments.
- ✓ ThryvPay payment processing service for service-driven businesses.
- ✓ Choice of payment processors, like PayPal and Stripe.



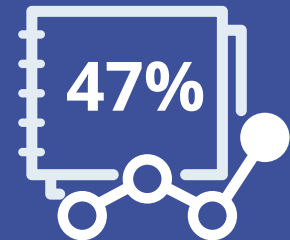


ALL THE APPS

Use Your Favorites in One Place

You don't have to give up the apps you love. Integrate them instead! Thryv users' favorites:

- ✓ Quickbooks
- ✓ Gmail
- ✓ Shopify
- ✓ Clover
- ✓ Mailchimp
- ✓ Zoom
- ✓ JotForm
- ✓ Indeed
- ✓ Yext Advanced



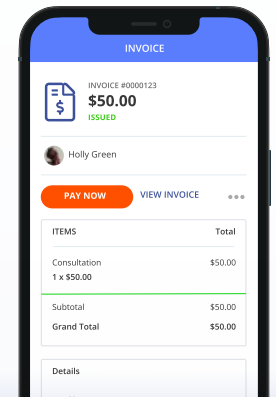
is the increase in leads small businesses experience after using Thryv.⁵

What Your Software Should Offer

Here's a glimpse inside how advanced operating systems work to make streamlining your business a breeze.

■ Sending a Payment Request

It easily sends a link with a payment request from an invoice. You can send the link via email or text.



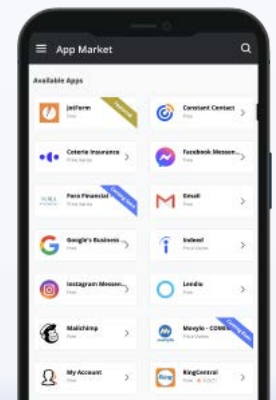
■ All Your Social Metrics in One Place

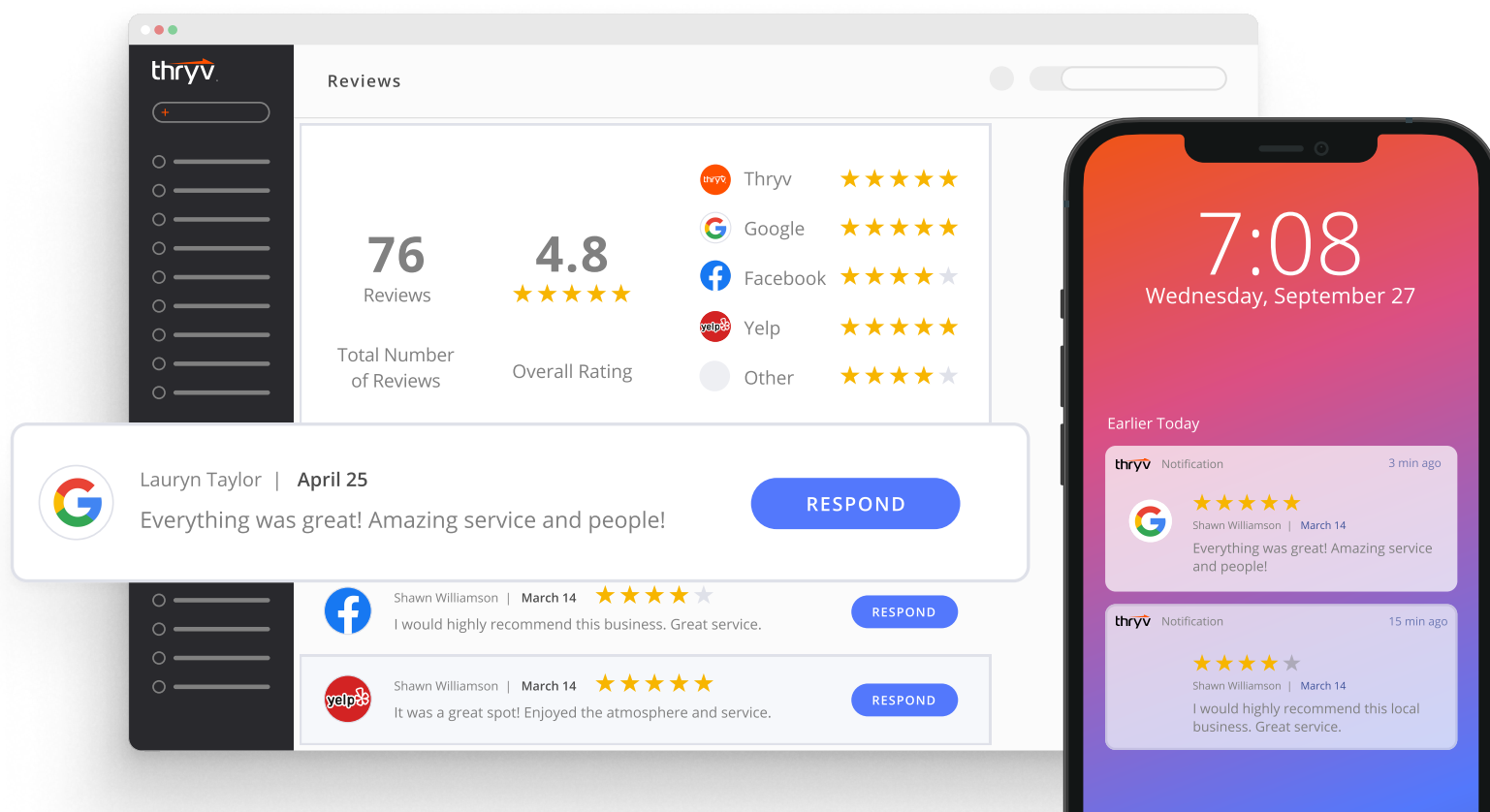
Get an at-a-glance overview of how your social media efforts are performing, how much your followers are engaging, and the best times to post.



■ App Market Awesomeness

Thryv's App Market is growing all the time, so you can manage everything from one place, from your meetings to your ecommerce.





Connect with your local Thryv
Business Advisor to learn more.

¹ "91% of consumers prefer businesses that offer both in-person and online options" -[VISA](#)

² "24% of small business owners spend up to 10 hours a week just on administrative tasks." -[NY Post](#)

³ "90% of Millennials book appointments through the web or from mobile devices." -[Finances Online](#)

⁴ "73% of consumers say that when comparing two businesses, the type of payment options available will influence their final decision." -[Thryv](#)

⁵ "47% the increase in leads small businesses experience after using Thryv." -[Thryv](#)