

## How to Streamline, Engage, and Grow: A Toolkit for Small Business Owners

By Jennifer Sanders – June 17, 2025



Image: [Freepik](#)

A lot of advice for small business owners is written by people who've never actually run one. You can tell right away—everything sounds efficient and tidy. But the day-to-day isn't tidy. You're answering customer emails between checking inventory, putting out fires on social media, and wondering why your online store keeps crashing every time someone tries to check out. You don't need a hundred tools. You just need the right handful that'll help things run smoother without demanding your whole weekend to set up.

### **You'll Need a Way to Keep Track of People**

This sounds obvious, but a lot of folks still use sticky notes and email threads to manage customer info. It works until it doesn't. A free customer relationship management (CRM) software like HubSpot gives you a way to store names, conversations, and past orders—[all in one spot](#). It's not sexy, but being able to pull up someone's info in 10 seconds when they call you angry is the kind of calm you can't buy.

## **Let People Book Without Having to Talk to You**

This isn't about being antisocial—it's about [not wasting time](#). Going back and forth over email to find a time that works for both sides gets old fast. Calendly is easy, and so is Square Appointments if you already use their POS system. People want to book you the same way they order food: quickly, and without needing instructions.

## **Put Agreements in Writing Without the Headaches**

Creating contracts for employees or customers is one of those necessary tasks that gets easier once you have a system. Digital platforms now let you draft, send, and sign agreements without printing anything out or chasing people down. That said, certain situations still require a [wet signature](#), where both parties physically sign the document by hand. After that, you can scan the signed copy back into digital form to keep everything stored and searchable.

## **Listen to What's Being Said When You're Not in the Room**

If someone's complaining about your business on Twitter or Reddit, wouldn't you rather hear it before it shows up in a Google review? That's where something like Mention comes in handy. It catches mentions of your name (or even just keywords you pick) so you can stay in the loop without living on social media. Even just setting up a few Google Alerts can help if you're starting from zero.

## **Automate the Stuff That Makes Your Eyes Glaze Over**

Nobody starts a business because they love copy-pasting email addresses into spreadsheets. And yet, that's how many of your hours disappear if you don't automate. Zapier helps connect apps so one thing triggers another. For example, if someone fills out your website form → their info lands in your CRM → you get an email → they get a welcome message. You set it up once, then it just works.

## **Send Fewer Emails—But Make Them Better**

You don't need to send weekly newsletters. Most people won't read them anyway. But if you send a [well-timed message](#)—like a thank-you note after a purchase, or a quick reminder when a service is due again—that sticks. Mailchimp and ConvertKit both let you do this without making it feel like marketing. And if you keep your tone human, not salesy, people will appreciate hearing from you.

## **Ask Customers What's Working (Before They Tell the Internet What's Not)**

Most people won't leave a review. But if you email them a [short survey](#) after a visit or a sale, they might tell you what you need to know. Google Forms takes 10 minutes to set up. Hotjar shows you where people get stuck on your site. None of it's fancy—but it gets you closer to seeing your business from the customer's side.

## **Keep One Eye on the Data Without Getting Lost in It**

You don't need to check analytics every day. But occasionally, it's helpful to know what people do when they land on your site. Are they leaving right away? [Getting stuck in checkout](#)? Tools like Fathom (a privacy-focused Google Analytics alternative) give you the basics in plain English. Use it just enough to make better decisions—not to chase every number.

Here's the thing. A tool doesn't fix a broken process. But if you've got a system that mostly works and just needs to be faster, smoother, or less chaotic, the right tools make a difference. Don't try everything at once. Pick one that fixes a pain point this week. Then fix another one next month.

*Elevate your organization's performance with insights from [The Jethro Project](#), where academia meets professional expertise in engineering, economics, management, and leadership.*