

The Guide to Digitizing Your Business With Software





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The Guide to Digitizing Your Business With Software

Some small businesses can survive on nothing but paper files and basic apps for their entire lifespan. However, the coronavirus pandemic has forced many to either digitize or shut down for good.

62%

of digital small businesses are planning to spend more on technology this year meaning that in order to stay competitive, your business needs to consider these digital investments.

While it can be painful to make these sudden and unexpected changes, the upside is that the digitization of your business can mean more profit, more customers, and more security in the long term.

If your business is just starting its digital transformation journey, here are five software categories we suggest exploring first to lay the framework for your digitized business.

Collaboration software

/ Collaboration software

What is collaboration software?

[Collaboration software](#) is a tool for agile teams located in different geographies or working remotely. It's typically used in advertising, banking, government, healthcare, marketing, and IT. Its primary features include document sharing, version control, role-based access and permission control, progress tracking, multichannel communication tools, and a document repository.

The software helps employees collaborate with ease, communicate quickly, and share resources. Working in a collaborative environment, multiple users can simultaneously manage and share tasks, projects, and updates in real time.

The benefits of collaboration software

Collaboration software offers many benefits to an organization that results in a streamlined workflow and effective completion of tasks and goals. It helps businesses do the following:

- ▶ **Improve productivity:** Executing projects on time requires live communication and collaboration. The software allows employees to share ideas, resources, and task updates with anyone, anywhere in real time. Unlike emails, this software doesn't bury the critical information in a clutter of unrelated messages. Users can create channels for every workflow as well as alerts to track their assignments and project progress.
- ▶ **Manage projects efficiently:** The single, combined dashboard lets multiple users organize projects and tasks, assign those to different collaborators, track workflows, and be informed of the progress. Users can inform their colleagues about the assigned tasks, track their workflows, and communicate with peers in real time.
- ▶ **Efficiently collaborate with remote workers:** The software allows businesses to expand their workflows and include remote workers or peers from different geographies. This way, companies can hire local talent instead of paying to relocate employees. Remote workers will have access to the necessary project files, which ensures continued productivity at a low cost.

eCommerce software

/ eCommerce software

What is eCommerce software?

[eCommerce software](#) is a tool for setting up an online retail store and managing operations. The software offers many features, including a self-service portal, website design, product listing, online payment processing, sales reporting, inventory management, and customer relationship management (CRM).

The benefits of eCommerce software

The software helps businesses quickly set up a digital storefront, making it easy to start selling online. Here are some of the benefits of using eCommerce software:

- ▶ **Set up an online store using a self-service portal:** The software offers prebuilt templates, themes, and various store functionalities such as cart, checkout, and payment gateway. You can choose the options you like, add your products, and push your store live.
- ▶ **Automate recurring tasks and processes:** eCommerce software lets you automate tasks such as computing shipping costs, discounts, and taxes. It also automates processes such as payment processing, order confirmation, and promotional emails.
- ▶ **Track inventory:** You can track products during various stages of the supply chain. Automatically de-list items that are out of stock at your store so that your online stock is always up to date.
- ▶ **Leverage built-in SEO and marketing tools:** Most solutions have built-in SEO optimization to rank your products higher on search engine results pages (SERPs). The software also offers marketing tools, either built-in or integrated, to help you run and manage social media, email, and other marketing campaigns.

Video conferencing software

/ Video conferencing software

What is video conferencing software?

[Video conferencing software](#) provides a platform with which organizations can hold meetings with participants that are in multiple separate locations. This kind of software is similar to several other types of software. While there are no hard and fast rules defining them, we can point out some of the general differences to help you in your search for the right product. For example:

- ▶ [Business phone systems](#) sometimes include conferencing functionality, and some even include video conferencing functionality. These can be either on-premise or cloud-based systems, but the video conferencing applications are generally secondary to—and rarely as robust as—the applications for voice calls.
- ▶ [Online meeting software](#) typically contains a wider range of functionality than dedicated video conferencing software. For example, it might include tools for polling meeting attendees, apps for setting up persistent online meeting rooms and tools for moderating attendee participation.
- ▶ [Telepresence and virtual event solutions](#) aim to provide very high-definition video and audio feeds, with the aim of providing a more immersive experience. They often use different codecs (formulas for compressing audio and video streams) and many require the installation of dedicated hardware, such as HD video screens, cameras, and microphones. Telepresence solutions are most common among large enterprises.

The benefits of video conferencing software

Some of the benefits of video conferencing software include:

- ▶ **Improved collaboration:** Video conferencing allows for more effective collaboration than email and phone calls alone. Companies find great value in having face-to-face meetings, even when they're done virtually via a video conferencing solution.
- ▶ **Cost savings:** Video conferences can be used to save time and travel costs of going to remote locations for meetings. Additionally, some platforms can be used to produce and stream webcasts whenever the content needs to be rebroadcast (for example, as part of an employee onboarding process).
- ▶ **Smaller carbon footprint:** Reducing the number of flights employees take to travel for meetings can greatly reduce a company's carbon footprint. According to the New York Times, a single round-trip flight between New York and California accounts for about 1/5th of the carbon emitted by a car over an entire year.

Project management software

/ Project management software

What is project management software?

[Project management software](#) is now an umbrella term, encompassing a range of solutions from lighter work management tools up to robust portfolio management (PM) solutions. It's important to understand the differences between these types of software so you can choose the tool that best meets your needs.

- ▶ **Work management software** helps teams manage workflows, organize tasks and activities, and collaborate in a shared workspace. These tools capture work execution, facilitate collaboration, and provide status updates and views relevant to different stakeholders. Their target user is non-technical business professionals.
- ▶ **True PM software** helps project managers and organizations execute projects - unique initiatives with a set scope, timeline, budget, and/or resources. These tools help businesses plan, monitor, and control costs, schedules, and resources so they can deliver value and meet project success criteria. Their target user is technical professionals, i.e., project managers.

The benefits of project management software

- ▶ **Better collaboration:** Projects often require collaboration between multiple stakeholders including team members, other teams, and external clients. Project management software enables effective collaboration to allow teams to quickly respond to project challenges and requests, as well as brainstorm on process improvement.
- ▶ **Streamlined project management processes:** Project management software offers the ability to create tasks, assign them to people, and track the status using dashboards. Real-time file sharing and collaboration tools save time. Business leaders have better control of their processes and can track project performance across different departments.
- ▶ **Accurate budget management:** Project management software helps businesses track estimated versus actual budgets so they can proactively identify and address areas that exceed the budget.

Remote support software

/ Remote support software

What is remote support software?

[Remote support software](#) allows IT professionals to provide remote computer support to both customers and internal network users. By making use of tools such as screen sharing and text chat, IT support staff can assist users with technical support issues as if they were sitting at the same workstation or mobile device as the end user. Remote support sessions can then be recorded in their entirety in order to be used at a later date for customer service, training, or compliance purposes.

The benefits of remote support software

- ▶ **Improved customer service:** By placing the IT specialist and customer in the same virtual space, remote support software allows companies to decrease the turnaround time needed to solve customer service issues. Remote support software apps also utilize call-logging, customer survey generation, and integration with customer relationship management software to provide and record critical customer service data.
- ▶ **Powerful training tools:** Most remote support software apps provide a session recording feature. By allowing you to record the entire customer support transaction, support staff can be trained for potential troubleshooting sessions by using real-life examples of how customer service instances should (or shouldn't) be handled.
- ▶ **Internal IT support:** Remote support software also allows your IT staff to support internal employees. By allowing you to access mobile devices and desktops within your own organization, IT staff can install, troubleshoot, and update software remotely. IT specialists can also use remote desktop control to train users on how to use apps vital to your organization's operation.

/ Next steps

The software selection process requires extensive planning and research. Once you've decided which areas of your business you'd like to digitize, you'll need to do extensive planning and research to find the best system for your business and how to roll it out to your team. Thankfully, [Capterra.com](https://www.capterra.com) offers tons of resources for you to find more information about the types of software listed in this ebook, compare products, read reviews, and more. Click through the links below to get started and checkout our software selection checklist at the bottom of this page to aid you on your digitization journey.

Review Capterra's digital products

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Use this checklist to help you navigate the software selection process

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