SMALL BUSINESS RESOURCE GUIDE

YACANEX

ECONOMIC · COMMUNITY · JUNTOS

2017 VERSION

2017 RESOURCE GUIDE

Fellow Colleagues,

This resource guide was created for those looking to learn more about technology tools that can assist small business owners run their businesses. The idea was born out of the Cooperative Developer Fellowship program with DAWI (Democracy at Work Institute) where I participated in the spring of 2016. We hope you find this information useful. All entrepreneurs including immigrants who want to create micro enterprises, small businesses, or coops, deserve to learn about the necessary resources to run a business. We hope this guide can be circulated and shared with as many people as possible to begin the exchange of resources.

We are currently based in San Jose, California. If you have any additional questions or would like more information, please visit our website at Yacanex.com.

Saludos,
Yacanex

About the Resource Guide:
Below are resources that we have identified for several categories such as task management, design, finance, and business planning tools. All titles have links to their respective websites. Most resources are free at initial level with a few exceptions.

Disclosure:
We work to provide the best guidance and resources for our clients. We are in no way endorsed by any of these companies. All of these resources are tools that we have used/use and/or suggest.

"Community Empowerment through Education"

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TASK MANAGEMENT TOOLS

ASANA
www.asana.com

Asana is a free tool that can be used to to create teams and assign tasks with due dates. Asana allows you to send messages to your teams as well as set reminders all in one place. This is great for both personal use and collaboration. Asana is accessible through mobile apps, tablets and computers.

Great teams get great results with Asana

From companies with off-the-charts growth to local businesses and non-profits, teams love Asana.

Pricing
There are upgrade options if you choose to enjoy more features or collaborate with teams larger than 15.

Free	Premium
$0	**$8.33** per member per month billed annually
Asana is free for teams of up to 15 people.	Price per member is automatically reduced for small teams.
Sign up for free	Calculate your price
✓ Unlimited tasks, projects, and conversations	✓ Unlimited tasks, projects, and conversations
✓ Up to 15 team members	✓ No team member limit
✓ Basic dashboards	✓ Unlimited dashboards
Unlimited guests	✓ Unlimited guests
Private teams and projects	✓ Private teams and projects
Priority support	✓ Priority support
Custom fields	✓ Custom fields
Task dependencies	✓ Task dependencies
Advanced search	✓ Advanced search
Admin controls	✓ Admin controls*
SSO and SAML	✓ SSO and SAML*
Data export	✓ Data export*
Customer Success Program	✓ Customer Success Program*
	*Organization upgrades only
Learn about all of Asana's free features	

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TRELLO
www.trello.com

Trello is a visual task managment tool that allows you to create boards with sub-projects within them. It also allows you to have collaboration teams to get these tasks done. You can set due dates for specific tasks to specific people within your team.

Pricing

Trello on the basic level is free. Business Version allows more unlimited powerG ups and customization on appearance and privacy settings. Paid version allows you to integrate your Trello cards with DropBox, Google Drive, Slack and Google Hangouts.

WHITEBOARD
www.whiteboard.co

Whiteboard is a task management tool that reminds you of your daily tasks and allows you to swipe your tasks as Done or Off, to Later, for tasks that cannot be accomplished today. It allows your to-do list to be flexible based on your flexibilty. Whiteboard allows you to view your personal and work tasks all at once or one at a time depending on your preference. Whiteboard is also great for collaboration and allows you to upload documents and files.

Intuitive
Easy to learn, easy to use. A simple interface that is as familiar as text messaging.

Any team, any size
From start-ups to Fortune 100, designers to marketers, Whiteboard is great for all teams.

Collaborate with ease
Communicate, share attachments and stay up-to-date with colleagues and clients.

Safe and secure
Your data is our priority. We take the protection of your information

Amazing Support
No pinch necessary, this isn't a dream. We provide an amazing

Pricing
Whiteboard offers unlimited personal workspaces at the free level. The Pro version offers additional storage and reminders.

Simple Pricing
Start using Whiteboard for free. Clear and transparent.
No 'shot clock' trials.

Basic
$0
always free

A good starting place for new users with core features and limited collaboration.

Sign Up For Free

Pro
$2
per month billed annually

For power users that need advanced features to take their productivity to the next level.

Get Started

Shared
$20
per month billed annually
$25 billed monthly

Great for collaborating with clients, colleagues and co-workers with access to all features.

Get Started

Basic Features
- Unlimited personal workspaces
- 1 shared workspace

Pro Features
- Everything in Basic
- 2GB of file storage
- Recurring to-dos
- Reminders

Shared Features
- Everything in Pro
- Unlimited shared workspaces
- 50GB of file storage
- Priority support

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CUSTOMER RELATIONSHIP TOOLS

CALENDLY
www.calendly.com

Calendly allows you to set availability time frames, making it easy for clients to schedule themselves on their own.

Calendar integration
Checks your Google or Office 365 calendar for conflicts, so you're never double-booked. Adds new events to your calendar automatically.

Simple, modern interface
Impress and delight invitees with an elegant design and smooth experience.

Fully optimized for all devices
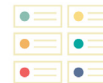Phone, tablet or desktop—you and your invitees can use Calendly anywhere, from any device.

Notifications
Automatically email custom confirmations and reminders to invitees.

Retain privacy and control
Set buffer times between meetings, prevent last minute meetings, create secret event types and much more.

Team scheduling
Display your team's availability on one convenient page.

Pricing
Calendly offers three levels of pricing. The basic level offers integration of Google Calendar, Office 365 and Outlook and allows you to schedule unlimited events. Paid versions offer many perks such as an event confirmation page and customizable automated reminders to your clients. Pro provides Basic + Premium offerings as well as Salesforce integration.

Enjoy a 14 day Pro trial.

And upgrade and downgrade as you wish.

Basic	Premium	Pro
$0	$8	$12
Totally free.	Per user / month (billed annually) or $10 per user / month (billed monthly)	Per user / month (billed annually) or $15 per user / month (billed monthly)
TRY FOR FREE	TRY FOR FREE	TRY FOR FREE
no credit card required	no credit card required	no credit card required
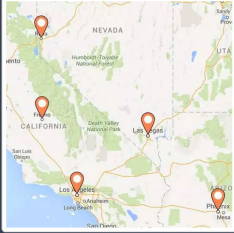
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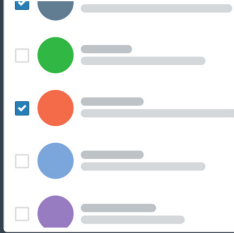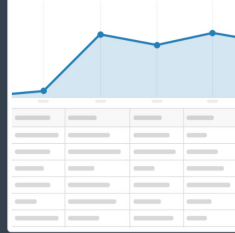
SNAPAPPOINTMENTS
www.snapappointments.com

SnapAppointments allows clients to set up appointments through your available time slots and send reminders via email, SMS, and/or phone calls. Using SnapAppointments will also create a CRM database of your clients in which you can add notes, images and receipts. This tool offers a simple way to sync with your Microsoft Outlook Calendar, Google Calendar and Apple Calendar.

Multiple Locations	Multiple Users	Online Scheduling	Business Reports
Business locations with separate or shared services, hours, and staff.	Staff can each be assigned specific schedules, roles, and permissions.	Your clients can access real time availability and book appointments.	Access detailed appointment, staff, and client reports for your business.

Pricing
Pricing begins at $14.99 for 1 staff member. Across all levels SSL Security & Data Encryption is offered. Basic pricing creates a custom landing page and allows client rescheduling.

Standard	Professional	Enterprise
$14.99 / month	Starting at **$29.**99 / month	Starting at **$149.**99 / month
1 staff member	5-50 staff members	Unlimited staff members
✔ Unlimited Appointments	✔ Unlimited Appointments	✔ Unlimited Appointments
✔ Unlimited Services	✔ Unlimited Services	✔ Unlimited Services
✔ SSL Security & Data Encryption	✔ SSL Security & Data Encryption	✔ SSL Security & Data Encryption
✔ 1 Location	✔ Multiple Locations	✔ Unlimited Locations
✔ 1 User Account	✔ Multiple User Accounts	✔ Unlimited User Accounts
✔ Email & SMS/Text Reminders	✔ Email & SMS/Text Reminders	✔ Email & SMS/Text Reminders
✔ Client Rescheduling	✔ Client Rescheduling	✔ Client Rescheduling
✔ Custom Email Templates	✔ Custom Email Templates	✔ Custom Email Templates
✔ Custom Landing Page	✔ Custom Landing Page	✔ Custom Landing Page
✔ Reporting	✔ Reporting	✔ Advanced Reporting
✘ Branding / White Labeling	✘ Branding / White Labeling	✔ Branding / White Labeling
✘ HIPAA-ready	✔ HIPAA-ready	✔ HIPAA-ready

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SIDELINE
www.sideline.com

Sideline is an application that allows you to have second phone number with your mobile phone. You can even transfer current work numbers onto the service. Sideline can be used for calls, SMS and MMS messages.

A real phone number
Choose a local area code (if you want) and get a 2nd number on your smartphone.
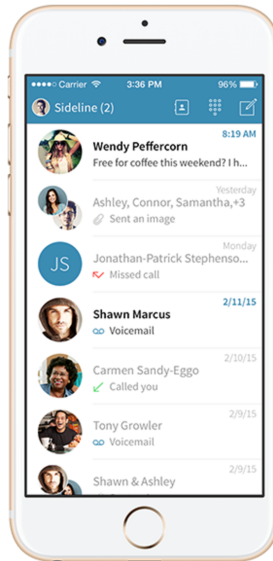
Carrier reliability (not VoIP)
Calls use your carrier and minutes (which are likely unlimited) so everything just works. Learn more

Texting
Texting is free and unlimited. Sideline's inbox puts all your communication in one place.

Transfer your number
Number porting lets you move existing numbers to Sideline. Learn more

Separate voicemail
Record and manage multiple voicemail greetings for your Sideline number.

Know who's calling
Separate caller ID, notifications and ringtones let you know who's contacting you.

Voicemail to text
Get your voicemails transcribed and read them as a text message *$2.99/month.

International calling*
Call over 165 countries with this optional add-on for $15/mo per user. Learn more

Pricing

Sideline offers the service for free at the most basic level. Options to upgrade to international calling are available.

	INDIVIDUALS $0 / forever	TEAMS $9.99 / mo per user
Choose Local Area Code(s)	✓	✓
Port In Existing Work Number(s)	✓	✓
Carrier Reliability	✓	✓
Unlimited Texting	✓	✓
Custom Voicemail Greetings	✓	✓
Auto-Text Replies	✓	✓
Never Pay Us For Calling	✓	✓
Use Your Minutes (unlimited or not)	✓	✓
Manage Multiple Team Lines		✓
Full Control Via Online Dashboard		✓
Prioritized Support		✓
Free 30-Day Trial		✓
Company Contact Directory		✓
Remove Ads	+ $3/ mo	✓

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DESIGN TOOLS

CANVA
www.canva.com

This is a free, easy-to-use tool to make eye catching designs. Most images Canva offers are free but you have the option to purchase other images for $1-$3 each. Once purchased, you're given 24 hours to make necessary edits. Canva also offers the option for you to upload your own images.
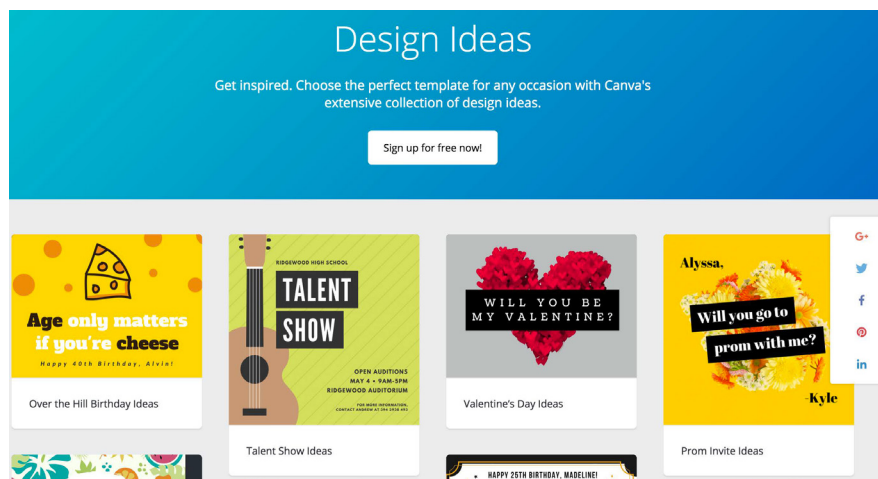
Pricing
Canva offers a Free or Upgraded Version called Canva for Work. Upgrading to Canva for Work for as low as $9.95/mo allows you to creating a branding kit for your business as well as resize files for better quality printing for larger posters.

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LUCIDCHART
www.lucidchart.com

Lucidchart is a great, easy-to-use flowchart maker with no designer experience needed. Lucidchart is very compatible with other programs such as Google Apps.

Our flowchart maker works the way you do

Our online diagram application makes it easy to sketch and share professional flowchart diagrams. From brainstorming to project management, we support all of your communication needs. That's why millions of users choose Lucidchart.

Pricing

Lucidchart offers a variety of pricing levels. The pricing ranges from $4.95/month to enterprise level. You can make basic flow charts with some shape options at the Basic Level.

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FINANCE TOOLS

MILEIQ
www.mileiq.com

MileIQ is an easy way to keep track of business mileage. Come tax-season you should be ready to submit a detailed log of business trips taken.

Log automatically.
No buttons to push, no start or stop needed. MileIQ remembers your drives so you don't have to.

Classify effortlessly.
All it takes is a swipe. Give your drive a purpose, and MileIQ will tell you its value.

Report confidently.
With your mileage log literally at your fingertips, deduct or expense miles with total peace of mind.

Pricing
MileIQ offers annual, monthly or limited plans. The annual plan offers to keep track of your miles for unlimited trips.

Annual Plan.
BEST VALUE

View, edit and report.
Unlimited drives for a full year.

$59.99 Annual Payment | **Save $12** Per Year

Monthly Plan.

View, edit and report.
Unlimited drives each month.

$5.99 Monthly Payment

Limited Plan.

View, edit and report.
40 drives each month.

Free

Every plan includes the MileIQ promise:

- All versions of our apps are ad-free
- Your data is never sold or shared
- Your drive history is secure and available when you need it

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PAYROLL
www.payroll.intuit.com

QuickBooks Payroll tracks hours, rates, sick time, and can even create tax forms. This tool is great option for businesses of all sizes.

Everything you need to manage your employees

Hiring tips and tools
Get help growing your business with our FREE hiring guide and access to valuable business advice.

Workers' compensation
Improve your cash flow with our workers' comp payment service. Pay only what you owe, as you go.

Poster compliance service
Keep current with mandatory Federal and State labor law posters - it's easy with our FREE updates.

Pricing

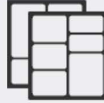QuickBooks Payroll offers different plans as well as the ability for them to run payroll for you. This is a great option for those who need help as the business scales.

I want to do payroll myself

Basic	Enhanced	Full Service (I want payroll done for me)

Basic

$20.^{00}/month

was $25.00
20% OFF for 6 months

+ $2/employee per month

Try It Free

Just Paychecks

- Runs payroll instantly
- Calculates taxes

(No tax forms included)

Learn more

Enhanced   MOST POPULAR

$31.^{20}/month

was $39.00
20% OFF for 6 months

+ $2/employee per month

Try It Free

Paychecks & payroll taxes

Includes everything in Basic, plus:

- Fills in tax forms automatically
- Files & pays taxes electronically

Learn more

I want payroll done for me

Full Service

$79.^{00}/month

was $99.00
20% OFF for 6 months

+ $2/employee per month

Contact Us

You enter hours, we do the rest

- We set up, run & file payroll for you
- We transfer data from previous providers
- Error-free accuracy guaranteed

Learn more

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QUICKBOOKS PAYMENTS
www.quickbooks.intuit.com/payments

QuickBooks Payments allows mobile and tablet payments on the go. It also allows you to send invoices to clients and track pending and paid invoices. Another great features is being able to allow your clients to make credit card and bank transfer payments directly from the online invoice.

Payment processing the way it should be – fast and easy.

Get paid 2x faster
Add a Pay Now button to your invoices and let your customers pay you online.

Manage your payments on the go
Manage your invoices and accept payments on the go with the QuickBooks mobile application.

Set-up recurring payments to save time
For clients you do the same work for each month, set up recurring payments or invoices.

Books are auto-updated
QuickBooks auto-updates invoices and reconciles fees and deposits, helping keep your books balanced.

Payments go straight to the bank
Get use to less trips to the bank. QuickBooks auto-deposits your credit card and bank transfer payments.

PCI compliant
We're here to protect your business and your customers.

Pricing

Pricing shown below is for QuickBooks Online Payments. QuickBooks Payments also allows for the option to do Desktop Payments and the price varies.

QuickBooks Online	Pay as you go $0/mo Get started
Bank Transfer (ACH)	Free
Card - Swiped	2.4% + 25¢
Card - Invoiced	2.9% + 25¢
Card - Keyed	3.4% + 25¢

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BUSINESS PLANNING TOOLS

BUSINESS MODEL CANVAS
www.strategyzer.com/canvas/business-model-canvas

This is a good starting point of a high-level business plan for anyone launching a business. The Business Model Canvas.
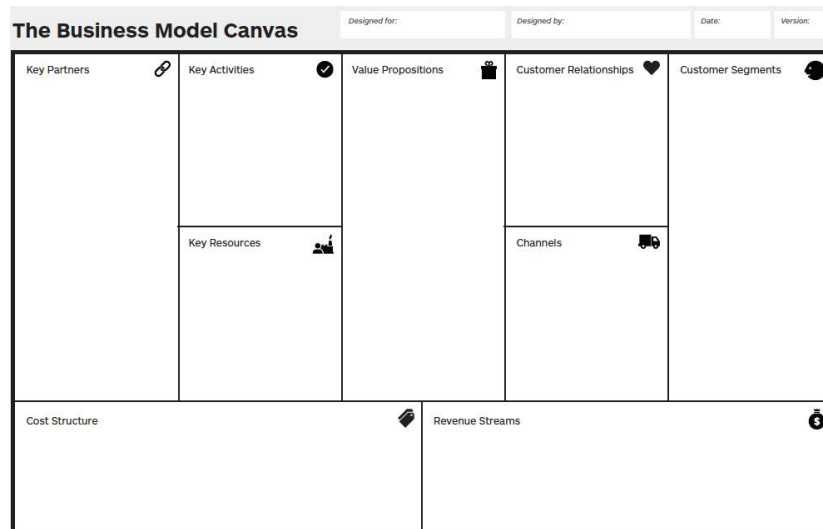
YOUTUBE VIDEO:
Y COMBINATOR START-UP SCHOOL
https://www.youtube.com/watch?v=CBYhVcO4WgI&list=PL11qn6zM2Y3bMZdChxEqHKaCaKUjwItGL

Y Combinator Start-Up School is a series of classes that was designed to help start-up companies. They have helped several successful start-ups get off the ground such as Dropbox, AirBnB, DoorDash and hundreds more! They cover hiring practices, how to attain capital, and how to develop successful business models.

AIRBNB PITCHDECK

The following is AirBnB's first pitch. Although it has changed, it remains as the ideal pitch format. It is used across many entrepreneurial classes and accelerators. It's concise and easy to understand which is an ideal model for pitching to potential investors and partners.

Welcome   **1**

AirBed&Breakfast

Book rooms with locals, rather than hotels.

> This is a PowerPoint reproduction of an early AirBnB pitch deck via Business Insider @ http://www.businessinsider.com/airbnb-a-13-billion-dollar-startups-first-ever-pitch-deck-2011-9

Problem   **2**

Price is an important concern for customers booking travel online.

Hotels leave you disconnected from the city and its culture.

No easy way exists to book a room with a local or become a host.

Template by PitchDeckCoach.com

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Solution 3

A web platform where users can rent out their space to host travelers to:

SAVE MONEY when traveling	MAKE MONEY when hosting	SHARE CULTURE local connection to the city

Template by PitchDeckCoach.com

Market Validation 4

630,000

on temporary housing site couchsurfing.com

17,000

temporary housing listings on SF & NYC Craigslist from 07/09 – 07/16

Template by PitchDeckCoach.com

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Market Size 5

1.9 Billion+

532M

10.6M

TRIPS BOOKED (WORDLWIDE)
Total Available Market

BUDGET & ONLINE TRIPS
Serviceable Available Market

TRIPS W/AB&B
Market Share
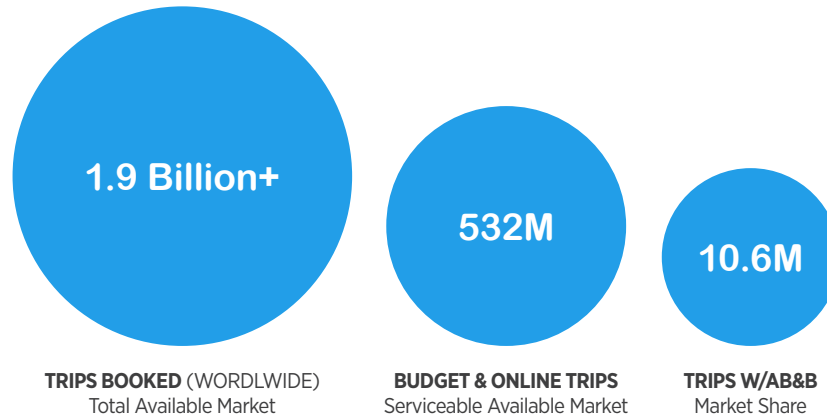
Template by PitchDeckCoach.com

Product 6

SEARCH BY CITY ⟶ REVIEW LISTINGS ⟶ BOOK IT!
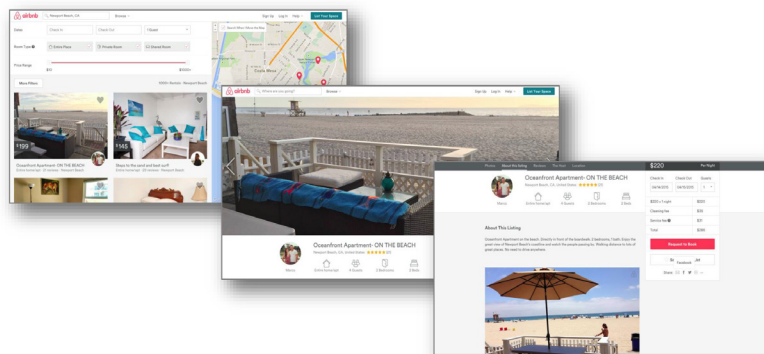
Template by PitchDeckCoach.com

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Business Model 7

10.6M → **$20** → **$200M**

TRIPS W/AB&B
Share of Market

AVG FEE
$70/night @ 3 nights

REVENUE
2008-2011

Template by PitchDeckCoach.com

Market Adoption 8

EVENTS
target events monthly

PARTNERSHIPS
cheap/alternative travel

CRAIGSLIST
dual posting feature

Octoberfest (6M)
Cebit (700,000)
Summerfest (1M)
Eurocup(3M+)
Mardi Gras (800,000)

GoLoco

KAYAK

ORBITZ

AirBnB
screenshot

with listing widget

Widget screenshot

Craigslist
screenshot

Template by PitchDeckCoach.com

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Competition   9

AFFORDABLE

CouchSurfing
craigslist
BedandBreakfast.com

AirBed&Breakfast
Hostels.com
Every Hostel, Everywhere!

OFFLINE TRANSACTION   ONLINE TRANSACTION

Rent Smart!
rentobi.com
furnished, unfurnished & vacation rentals

hotels.com.

VRBO
Vacation Rentals
by owner

EXPENSIVE

Template by PitchDeckCoach.com

Competitive Advantages   10

1ST TO MARKET	HOST INCENTIVE	LIST ONCE
Lorem ipsum dolor sit amet,consectetur adipiscing elit. Integer nec odio. Praesent libero.	Lorem ipsum dolor sit amet,consectetur adipiscing elit. Integer nec odio. Praesent libero.	Lorem ipsum dolor sit amet,consectetur adipiscing elit. Integer nec odio. Praesent libero.
EASE OF USE	PROFILES	DESIGN & BRAND
Lorem ipsum dolor sit amet,consectetur adipiscing elit. Integer nec odio. Praesent libero.	Lorem ipsum dolor sit amet,consectetur adipiscing elit. Integer nec odio. Praesent libero.	Lorem ipsum dolor sit amet,consectetur adipiscing elit. Integer nec odio. Praesent libero.

Template by PitchDeckCoach.com

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To receive our annual resource guide please register at

www.yacanex.com

We encourage you to share this guide.
For questions or feedback please e-mail us at

preguntas@yacanex.com

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"Community Empowerment through Education"