

# 2024 GUIDE

MODERN  
TECHNOLOGY  
FOR BUSINESS



# HATCHET TECHNOLOGY CONSULTING

A web technology partner for ambitious brands since 2008.



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*When I founded Hatchet Consulting in 2008, the web technology landscape was leagues away from what it is today...*

*WordPress had just begun to dominate the website CMS race, with Magento, Drupal, and Joomla following closely behind. E-commerce websites were peppered with bright yellow "BUY NOW" buttons and PayPal logos. Technology consultancies were heavily focused on enterprise clients, leaving most entrepreneurs desperate for help sorting out their technology stack.*

*If you started a business with an online marketing presence in 2008, there's a good chance you struggled to cobble together the software and services to meet company demands.*

*Today, the opposite is true — endless services fill every market role. Now, filtering and finding the right technology for your business feels utterly hopeless.*

*This is the reason I wrote this guide.*

...

*I can honestly say that after nearly two decades in technology and thousands of client projects, I'm uniquely positioned to offer my thoughts and guidance regarding the tools and services you need to consider.*

*Keep in mind that, depending on your business, only some of my recommendations will apply to you. That said, most small to mid-sized companies will benefit from focusing on the best-in-class technology options outlined in the following chapters.*

*With that said, thank you for taking the time to read this guide, and congratulations on joining the proud ranks of modern entrepreneurs! It's been the most incredible adventure of my life, and I hope it will be for you, too.*

Warmly,

~ Evan

# Business Technology: The Basics

Ok, we've got a lot of territory to cover. First things first, I want to be sure we lay a solid foundation. Let's look at a few foundational technology requirements that nearly every modern business must address.

Before we go any further, I want to clarify that networking and desktop hardware are not part of the core service offerings at my consultancy. However, I've been advising clients on these topics for years, so my guidance is well-informed.

## Choose a Hardware Ecosystem

Selecting the proper desktop hardware for your business is a decision worth pondering before purchasing. The technology you choose forms the backbone of your operations, impacting everything from day-to-day productivity to long-term scalability.

Based on personal experience and many years spent observing client outcomes, **I recommend Apple devices for businesses without specific PC requirements.**



### Why Apple Devices?

No, Apple isn't paying me to tell you this; trust me, I ran my first software company as a full PC shop. And it worked out. Sure, we had some laptop turnover and a workstation or two that gave us perennial trouble. But overall, nothing kept us from growing as a business and meeting the needs of our clients.

I simply switched to MacBook Pros in 2013 when I needed to purchase a new suite of laptops for the office. I've never regretted my decision and recommend everyone follow my lead when possible.

Once you understand the benefits of running on Apple hardware, you'll know why I never looked back:

**Reliability and Longevity:** Apple devices are known for their build quality and reliability. This durability translates to fewer hardware issues over time, reducing the need for frequent replacement or repair. This means lower operating costs and less business downtime, contributing positively to your bottom line.

**Ease of Use and Integration:** Apple designs its ecosystem for seamless device integration. This interconnectedness facilitates a smoother workflow, especially for teams that rely on multiple devices to perform tasks. The ease of use associated with macOS and iOS leads to fast onboarding, as users often perceive these operating systems as more intuitive.

**Security Features:** Security is a paramount concern for businesses, and Apple devices offer robust built-in security features, including regular software updates that address vulnerabilities, encryption services like FileVault, and generally lower susceptibility to viruses and malware than their PC counterparts. This integrated approach to security simplifies IT departments' efforts in safeguarding company data.

**Resale Value:** Apple devices typically maintain a higher resale value over time compared to PCs. This aspect can be advantageous for businesses looking to upgrade their hardware, as selling off old devices can offset the cost of new purchases.

## Considerations for Unique Business Needs

While my general recommendation favors Apple devices, it's essential to acknowledge that specific business needs may dictate otherwise. Due to software compatibility or specialized hardware needs, particular industries or applications may require Windows or Linux-based PCs. In such cases, hardware selection should be guided by the specific requirements of the software or tasks critical to business operations.

Examples include:

**The Construction Industry:** I've set up and managed tech stacks for several construction companies using PC hardware due to project management tools and software requirements.

**Fintech and Algorithmic Trading:** Some industries that appear cutting-edge rely heavily on older PC-focused software. Be sure to thoroughly vet the software you expect to run to rule out the need for PCs.

**Education:** Many schools and universities have predefined requirements around technology compliance. If your business works with one or more educational institutions, check with the school's administration before purchasing your tech kit.

# WIFI & Security

Most modern business transactions occur online, making secure WIFI mandatory. Having worked with many solutions, I am very comfortable recommending one commercial and one home office solution. UniFi comes to mind for businesses looking for top-notch hardware and software (commercial offices). In contrast, Google Mesh Network is an excellent budget-friendly alternative (Home office).

## UniFi: Premier Choice for WIFI and Security

UniFi by Ubiquiti Networks offers a suite of networking products that combine robust performance with advanced security features, making it a solid choice for businesses prioritizing network reliability and data protection. I've run UniFi at both of my commercial offices and have always had positive outcomes.

**Scalable WIFI Infrastructure:** UniFi designs its access points and network devices for scalability, allowing businesses to expand their network coverage seamlessly as they grow. This scalability ensures consistent and reliable WIFI coverage across all areas of operation, from small offices to large warehouses.

**Advanced Security Features:** UniFi systems are equipped with advanced security protocols to manage network access and protect against external threats. Features such as built-in firewall policies, VLAN support, and guest network capabilities enable businesses to fine-tune their network security settings according to specific needs.

**Centralized Management:** The UniFi Controller software acts as a single pane of glass for network management, allowing administrators to configure, monitor, and manage network devices from a centralized interface. This simplifies network administration, ensuring businesses can swiftly identify and resolve issues.

## Google Mesh Network: A Cost-Effective Alternative

For smaller businesses or those with tighter budgets, the Google Mesh Network (part of Google Nest Wifi) offers a straightforward, cost-effective solution to improve WIFI coverage and speed. I run Google Mesh in my home office and have noticed a considerable improvement in WIFI access in locations distant from the modem.

**Easy Setup and Management:** Google Mesh Network is renowned for its user-friendly setup and management, with the Google Home app guiding users throughout the entire setup process. It also features simple tools for managing network settings, making it accessible for businesses without dedicated IT staff.

**Seamless WIFI Coverage:** Using multiple mesh points, Google Mesh Network ensures comprehensive WIFI coverage throughout business premises, eliminating dead zones and providing consistent internet access to all devices.

**Built-in Security:** Although more consumer-focused, Google Mesh Network includes essential security features such as automatic updates, WPA3 encryption, and the ability to create guest networks. These features provide a basic level of security that's more than suitable for small businesses.

# Communication & Business Productivity

The heart of business productivity lies in effective communication and collaboration tools. A well-chosen suite of applications facilitates seamless interaction among team members and enhances overall operational efficiency.

Drawing from many years of experience navigating the sea of available tools, I recommend robust, reliable solutions that consistently deliver value across many business contexts.



## Google Workspace: Email and Online Business Apps

Google Workspace is a comprehensive suite of cloud-based productivity and collaboration tools designed to streamline business operations, foster team collaboration, and enhance efficiency.

Offering a range of applications from email (Gmail) to document creation and real-time collaboration (Docs, Sheets, Slides) and secure cloud storage (Drive), Google Workspace is tailored to meet the dynamic needs of new businesses. Here's a consolidated view of the value Google Workspace offers:

### Seamless Collaboration and Communication

**Real-time Collaboration:** Google Docs, Sheets, and Slides allow multiple users to work on the same document simultaneously, with changes reflected in real-time. This facilitates seamless collaboration among team members, regardless of location.

**Integrated Communication Tools:** With Gmail, Google Meet, and Chat, Google Workspace provides a unified communication platform, enabling teams to stay connected through email, video conferencing, and instant messaging.

### Scalability and Customization

**Scalable Infrastructure:** As your business grows, Google Workspace quickly scales to accommodate new users and increased data storage needs without significant IT infrastructure investment.

**Customization and Control:** Google Workspace offers admin controls for user management, data security, and device management, allowing businesses to customize their setup to match their specific requirements.

## Security and Reliability

**Advanced Security Features:** Google Workspace includes robust security features such as two-factor authentication, encryption in transit and at rest, and advanced phishing and malware protection, ensuring data remains secure.

**Reliable Infrastructure:** With Google's cloud infrastructure, Google Workspace offers high uptime and reliability, minimizing disruptions to business operations and enhancing productivity.

## Cost-Effectiveness and Efficiency

**Reduced IT Costs:** By leveraging Google's cloud infrastructure, businesses can reduce the overhead costs associated with maintaining servers and other hardware.

**Streamlined Workflow:** Integrating various tools within Google Workspace streamlines workflows, reducing the time and effort required for scheduling meetings, sharing files, and managing projects.

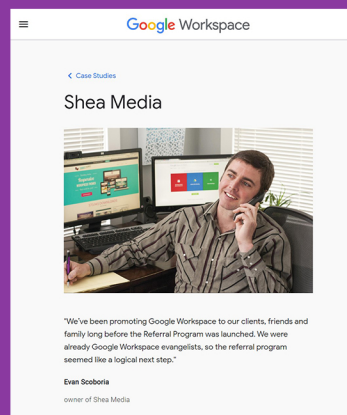
## Accessibility and Integration

**Access Anywhere, Anytime:** Google Workspace is cloud-based. All documents and emails are accessible from any device with an internet connection, providing flexibility for remote or on-the-go work.

**Ecosystem Integration:** Google Workspace integrates with various third-party apps and services, allowing businesses to extend their functionality and tailor solutions to specific operational needs.

## How Long Have I Trusted Google Workspace?

**By 2013, I had referred so many customers to Google Workspace (then Google Apps) that they showcased me on their website!**



## Slack: Instant Messaging

You're likely more than familiar with Slack if you come from the software industry or startup world. In this case, you can probably hear the notification chime in your sleep;)

For those unfamiliar with Slack, let's explore why it has become the go-to communication tool for technology companies of all sizes.

Slack is a team communication tool with instant messaging capabilities, much like group SMS over smartphones. It fosters an environment where communication is streamlined, collaboration is effortless, and information is readily accessible, making it extremely valuable to teams, especially new and growing businesses. By centralizing messages, files, and tools in one place, Slack helps team members easily find and share information, reducing time spent searching through emails or disparate systems for project updates or documents.

One of Slack's core strengths is its ability to integrate with a multitude of tools and services. This integration capability allows businesses to automate workflows, directly transferring notifications from services like Google Drive, Trello, and GitHub into Slack channels. This seamless integration landscape turns Slack into a central hub for day-to-day operations, enhancing productivity by minimizing the need to switch between apps and platforms.

While Slack is fantastic, it can derail productivity if not managed properly. Just as office culture must be nurtured to provide an efficient workplace, digital communication channels must be managed to ensure team members are not overwhelmed with messages.

After a busy day on Slack, you'll understand what I meant about "hearing notifications in your sleep." Trust me, it can haunt you if not throttled to manageable levels.



### Slack #sales-leads Channel

A great Slack trick for startups and small businesses is to route all lead sources into a single Slack channel that your sales team can collaborate on. Doing so allows you to discuss, vet, and delegate leads to team members in a transparent location.

I recommend using Zapier to capture and send leads from sources to your Slack account. We'll discuss Zapier in more detail later on.



## Zoom (Video Calling)

Zoom became a household name during the COVID-19 pandemic as millions of office workers transitioned to home-office life. As we'll discuss, there's a reason why its name became synonymous with video conferencing.

Zoom redefined the landscape of video communication, offering a platform that combines simplicity with powerful features to facilitate meetings, webinars, and collaboration from anywhere in the world. Its value to new businesses is immense, providing a reliable means to connect with team members, clients, and partners without the constraints of physical location.

The platform's ease of use is one of its most significant assets; with just a few clicks, users can start or join meetings, making it accessible to participants regardless of technical proficiency. This accessibility ensures you can convene meetings quickly and make decisions promptly, allowing teams to maintain momentum on projects without delay.

All that said, Zoom can be frustrating. Large online meetings require practice and finesse, and not all employees will share the same ethos regarding acceptable appearance and behavior on calls. Be prepared to set expectations for your staff if your company interfaces with enterprise or traditional business partners.

## Building Your Web Presence

### Domain Registration

When the topic of domain registration comes up, many think of providers like Godaddy, NameCheap, or IONOS. Whatever you do, don't use these services to purchase and manage your domains – your sysadmins and web developers will thank you! Instead of dealing with the bloat and fees, open a free Cloudflare account and register your domains.

Cloudflare charges domain registration fees at cost, directly translating to more economical business pricing. This is particularly beneficial for startups and small businesses looking to maximize their budget at every step of their operations.

Beyond affordability, Cloudflare's security features are best-in-class. The platform offers protections designed to shield your domain from various cybersecurity threats. This includes DDoS protection, which is critical for mitigating the risk of service disruptions caused by targeted attacks. Additionally, SSL/TLS encryption comes standard with Cloudflare, ensuring that data transmitted to and from your website is securely encrypted, making it a must-have for maintaining the trust of visitors and customers.

Cloudflare also excels in domain management, providing tools that cater to both novices and experienced users, balancing simplicity for straightforward tasks and advanced features for more complex needs.

For instance, DNS management through Cloudflare is intuitive yet powerful, allowing users to configure DNS records easily while supporting advanced DNS settings. This flexibility is advantageous for businesses needing to scale or adapt their online presence rapidly.

# Website Development

It's not an exaggeration to state that many hundreds of businesses run on custom websites I've built, and hundreds of thousands run on templated websites from my shops. After all that, there are only a handful of website development options I can confidently recommend. I've chosen these options because they represent the most stable, safest, and highest-quality options available now.

## Custom-Built "Static" Websites

I admit to being at the forefront of the WordPress revolution that swept the web from 2008-2015. I built countless WordPress sites and distributed millions of free and premium WordPress themes.

But I noticed something over the years. Over and over, sites that initially looked glossy and pristine began to degrade, sometimes falling offline due to conflict between the WP Core, Plugins, and Themes. Many sites looked lousy or outright disappeared within a couple of years.

While WordPress offered some value through self-management, it failed to realize the true purpose of all marketing and e-commerce websites: to provide a stable, trustworthy representation of a company.

On the other hand, custom-coded sites I built for clients in 2008 continue to shine today!

### **So, how does a custom website build work?**

First, the agency building your custom website will work with you to nail down a design that represents your business and meets your goals. Next, they will translate this design into a fully functional website using a modern user interface library like React.js or Angular.js.

This website will be hosted on a hyper-stable environment like Vercel, Netlify, S3 from Amazon Web Services, or a Cloudflare Worker.

And with that, your website should stand the test of time.

### **Are there any Drawbacks?**

It depends on how you look at it...

With a custom-built website, you (the business owner and your staff) will not have access to make edits to the content of your website directly.

While this may feel restricting, just think about all those WordPress websites we discussed earlier that rapidly degraded and failed to represent their companies effectively.

Ensuring only skilled developers and design teams interact with your website content keeps your web presence sharp for the long run.

## Why Fully Managed Websites Are Better for Small Businesses

The fully managed website model for small businesses is a cost-effective way for startups with small teams to harness all the value that bigger enterprises get from running in-house teams, complete with designers and developers.

By outsourcing this responsibility to a highly skilled and qualified consultant, you ensure that every change to your digital branding maintains the polish and consistency you expected at launch.

Curious if a custom-built website is right for your business? Call me at 360-643-1204 to discuss your company's needs.



### Shopify

If your business includes an e-commerce component and you're looking for a pre-packaged web sales solution, I strongly recommend Shopify. It's not the most accessible platform to configure, populate, and launch, but its strengths outweigh the inconveniences. Shopify is appropriate for businesses of all sizes, offering comprehensive tools, features, and a rich array of customizable templates and themes. This allows companies to design stores that closely resemble brand identities.

Beyond the initial setup, Shopify shines with its extensive ecosystem of apps and integrations. Whether adding customer reviews, implementing email marketing, or setting up a rewards program, Shopify's app marketplace offers solutions that enhance the functionality of online stores and improve the customer experience.

These apps integrate seamlessly (mostly) with the platform, ensuring businesses can expand their store's capabilities as they grow. Furthermore, Shopify's robust API and advanced developers' tools provide flexibility for more complex customizations and integrations, catering to the unique needs of each business.



## **WordPress**

Let's talk about WordPress. Not because it's the right choice for most businesses but because it's statistically the route most companies take.

### **What does WordPress do well?**

The WordPress ecosystem is enormous, which feels fantastic when building your website. There's a plugin for every imaginable use case and a theme for every conceivable business vibe. If you choose the WordPress route, there's no doubt you'll benefit from its richness.

### **Where does it fall short?**

WordPress websites are constantly devolving. There's no nice way to put it. The average client WordPress site I work on has at least ten plugins installed and activated, often many times that number. Each of these plugins is constantly being updated by its developers, as is the WordPress core. Add to this the complexity of many modern WordPress themes, and the potential for conflict and failure is almost constant.

## **Making the most of WordPress:**

If you decide WordPress is right for you, here are a few recommendations.

### **Hosting**

Local businesses and startups that expect at most 10K visits per month should use BlueHost hosting. It's low cost and sufficient to keep websites up and running.

More significant sites should look at Kinsta or WP Engine. Both offer more underlying power, but the cost reflects this.

### **Plugins**

Keep the number of plugins on your site down to as few as possible. Your site will run faster, and you will experience fewer issues.

Here are a handful of plugins that have long development histories and even larger user bases, ensuring the least likelihood of issues:

WooCommerce, Akismet, Yoast SEO, Contact Form 7, Elementor, Jetpack, Advanced Custom Fields, WP Super Cache, Smush

## Automation Tools like Zapier

Now that you have a website and are adding additional technology tools and services to your kit, you may wish to connect automation platforms. If this need arises, consider Zapier.

Zapier connects disparate business tools, enabling automation of workflows between apps like CRM and email marketing platforms. While powerful, I advise you to use Zapier judiciously to maintain control over your processes and ensure data integrity.

Zapier can automate repetitive tasks, saving time and reducing the risk of human error. However, monitoring these automations is essential, especially when dealing with customer data or critical business operations.

### Intuit: a blessing and a curse

The following two sections focus on a suite of CRM, billing, and accounting tools produced by or integrated with Intuit's QuickBooks online offering.

Now, I don't want to give the impression that Intuit's services are issue-free – they are not. QuickBooks online can be frustrating, and Intuit support is a headache; not to mention, its pricing can feel predatory.

That said, no other ecosystem of products works better together or provides small to mid-sized businesses with as much operational power.

## Customer Relationship Management

Regardless of size, nearly all companies would benefit from a customer relationship management (CRM) tool. However, very few use them in my experience. These tools store and organize sales lead contact information and opportunities, allowing for organized marketing efforts and post-sales support.

In the past, most CRM options were priced for enterprise customers, excluding nearly all small to mid-sized businesses. Recently, though, options that integrate with standard business tools at prices appropriate for most companies have become available.

I recommend Method CRM for its versatility, ease of integration, and cost-effectiveness. You'll understand why when you compare Method's cost-to-value ratio to a similar feature set from Hubspot or Salesforce.

Method CRM stands out in my mind for its integration with QuickBooks Online. This synergy between your CRM and accounting software streamlines operations, ensuring that customer data, transactions, and interactions remain synchronized. It eliminates the need for double data entry, reduces errors, and saves time, allowing your team to focus more on customer engagement and less on administrative tasks.

# Accounting and Financial Management

Depending on your personality, accounting and financial management are the bane or 'fun part' of running a business. Either way, accounting software plays a critical role in achieving these goals. Only QuickBooks Online offers the wide breadth of features and customizations required by most modern businesses at prices appropriate for small to mid-sized companies.



## QuickBooks Online

One of the standout features of QuickBooks Online is its extensive integration capabilities. It seamlessly connects with various third-party tools and services, including Method CRM (mentioned earlier in this guide), payment processing platforms, and time-tracking tools. This interconnectedness ensures that financial data flows smoothly across your business systems, reducing manual data entry and the potential for errors.

My biggest complaint with QuickBooks and Intuit is the endless drumbeat of small fees for added features. If you're just starting, you may not run into these added costs, but over the years, you likely will.

## QuickBooks Time

## QuickBooks Timesheets

Since I've recommended QuickBooks Online, I want to draw your attention to QuickBooks Timesheets (which integrates directly with QuickBooks Online) as a seamless solution for capturing billable hours, managing employee time, and ensuring payroll is accurate and compliant.

Setting up QuickBooks Timesheets can be very challenging, especially if your QuickBooks account has years of data and long lists of customers. Conversely, new accounts should find integration streamlined and painless.

# Marketing Tools

Now that you have your CRM set up, let's figure out how to load your sales pipeline with a flow of new leads and keep existing leads warm and engaged.

These recommendations may seem obvious for those of you who come from a marketing background, but for everyone else, focusing on a few good tools and channels is essential. Don't get distracted by the thousands of shiny objects in the marketing realm, which all promise "endless hot leads." Marketers market to each other most viciously, so keep it simple.

## Email Marketing: Mailchimp

Mailchimp was one of the first email marketing providers to target small to mid-sized businesses. Over the years, it's become increasingly feature-rich, solidifying its position as the go-to email marketing option for most companies.

Mailchimp offers an intuitive platform for designing, sending, and tracking email campaigns. It automates marketing campaigns and segments audiences based on behavior, preferences, or past interactions, allowing for more personalized and effective communication.

## Digital Marketing Channels

### Facebook Ads

Running Facebook ads is my first choice anytime I'm asked to recommend the single most powerful digital marketing channel.

Meta's Ad Manager lets you target your creative to unique audiences that best resonate with your message. Whether an audience of a few thousand or hundreds of millions, with Facebook, you can get in front of anyone.

The only tricky part is the steep learning curve. If you're not able to hire an agency or consultant to work with you, please review the following resources:

Ben Heath: <https://www.youtube.com/@BenHeath/videos>

Ben's videos may be a little brutal to watch if you're part of an older audience like me, as they employ the driving kinetic energy millennials seem to love. That said, his insight is pure gold!

Facebook for Business: <https://www.facebook.com/business/ads>

Facebook's documentation for their ad offerings is worth a read.

## Google Ads

Second only to Facebook Ads is Google Ads. Google Ads lets you purchase placement for popular terms at the top of search result pages. While this may sound easy, finding the right audience and getting clicks at a reasonable price is tricky.

Here are a few resources to get you started on your Google Ads journey:

Aaron Young: <https://www.youtube.com/@AaronYoungGoogleAds/videos>

Much like Ben Heath's videos but with a focus on Google ads, Aaron covers many topics. He does it with a LOT of energy, too.

## Working with Technology Professionals

Finding a great technology partner should be at the top of your list when starting or growing an existing business into new markets. A skilled consultant will solve problems before they impede your business goals.

Here are a few things to remember:

**A technology consultant should care about your business and take the time to understand WHY your company has a new technology requirement. Without fully understanding this need, technology solutions will create additional problems.**

**A technology consultant should speak the language of business as fluently as they speak the language of technology. You should be able to rely on a potential consultant to translate business needs into technical solutions and explain technology solutions to you in an approachable way.**

**A technology consultant should never claim to have the answer. Instead, they should provide options and solutions that will meet your goals and help you vet options to find the one that's right for you.**

### Work With Evan



At Hatchet, I focus on producing high-end, fully managed websites for ambitious brands and startups, alongside building powerful marketing architecture using best-in-class technology.

If you would like to discuss how Hatchet can help you meet your business goals, please contact me at [evan@scoboria.com](mailto:evan@scoboria.com).