



20 Applications to evolve the way you work

Finance

The spreadsheet is the foundational tool for staff that work with numbers. Today there are amazing tools that make the work of keeping the books balanced a lot easier.



Wave (<https://www.waveapps.com>) is a very powerful accounting software in the cloud. It manages invoicing, payments, payroll, receipts and more. It even integrates with your bank accounts for reconciliation. Wave also has companion apps for your smartphone to capture receipts on the go and capture them in your accounting. The best part is the base software is **free to use**. The pay services are expert advice and payment processing fees.



Xero (<https://www.xero.com>) is quickly becoming a favorite accounting app for small to medium business. Many businesses view Xero as a more powerful and extensible replacement for QuickBooks. It has the same basic features as Wave, but also goes beyond the basic functions with inventory management, advanced reporting, and a ton of integration options.



FreshBooks (<https://www.freshbooks.com>) is a highly awarded cloud based accounting application. It lacks some of the functions of Wave and Xero, such as payroll, but has project billing functions built in. Freshbooks is tailored toward service based businesses that are billing for hourly services or retainer based agreements.

Quoting

Sales people should be selling not spending hours writing proposals and quotes. Quoting software can dramatically cut down the administrative requirement for writing and sending quotes to customers.



Quotewerks (<http://www.quotewerks.com>) allows you to quickly add products and services to a template quote, send the quote digitally, confirm receipt, and have quote signed digitally. After all, it is 2016, we should not have to fax agreements anymore. Quotewerks also has integration with distributors, so product can be ordered and tracked from the same portal. Saving further administrative time.



Quosal (<http://www.quosal.com>) has many of the same features as Quotewerks. Quosal Sell is a web based portal for managing quotes and some degree of funnel management as well.

Task Management

How does your organization currently manage tasks and delivery dates? Most companies simply email each other. Using email creates a gap in visibility and accountability. From simple task assignments to complex project management, there are tools available to facilitate the collaboration of a team or simply manage your personal to-do list.



Asana (<https://asana.com>) is a simple task management tool that is very flexible. In Asana, you can create a number of projects and assign individuals to specific tasks. The tasks can be given delivery dates as well as facilitate discussion and file sharing. The projects can even be viewed at a dashboard level to give a snapshot view of the progress being made. Asana is **free** to use with advanced features available for a monthly service fee.



Trello (<https://trello.com>) is a much more visual approach to task management. If your tasks and projects have a visual component, such as design, graphics or manufacturing, Trello may be a better fit. Like Asana Trello is also **free**, with additional features for purchase.



Jira (<https://www.atlassian.com/software/jira/core>) is well established in software development teams, but it does have a core function as a collaboration platform. Of the three options Jira is arguably the most powerful when customized correctly. It has the capability for workflow management far beyond simple task management.

Time Entry

For many organizations time entry is a necessary component to recognize how the organizations time is being spent. This is particularly true for service based organizations. Accurate time entry is critical to understanding effort and gauging project profitability. No one loves time sheets, but you can make it easier for people with some next generation tools.



Toggl (<https://toggl.com>) is a super simple method to track time in detail. The power of toggl, like many other modern apps, is its ability to integrate with other applications. Xero, Trello, zendesk, wunderlist, asana, basecamp, and others. The time you enter in toggl gets entered in to your project management tool, accounting app, or task management software. This reduces the need for duplicate entry and increases time entry compliance. The reporting tool is excellent for creating a overview of time on project or by resource.

HARVEST

Harvest (<https://www.getharvest.com>) is easy to use, just like toggl. Harvest also integrates with numerous management applications. Harvest has a few extra features like expense tracking and invoicing. It is more suitable for smaller teams or individuals as it allows a single interface to manage a number of functions.

Collaboration

In the modern workplace, team work and collaboration with others is critical to success. Whether an organization is 1 person or 1000 people, work is shared amongst the team. Communication between the members of the team and management play a critical role in team success. Communication is also vital for development and maintenance of company culture. In large organizations or distributed organizations effective communications becomes exponentially more difficult. A distance of only 40 meters has been shown to degrade the quality of communication and collaboration amongst teams.



Slack (<https://slack.com>) is taking the world by storm. In the short two years since it's start it has grown at a dizzying pace. After the first year it was valued at over 1 Billion dollars and continues to add 10,000 users per week. Slack's simplicity is deceiving. It looks a lot like a simple chat room application, but integrates with just about any application you can think of. Making it a functional centerpiece for group collaboration. It uses channels for as many topics as necessary for the team. Using a chat application can reduce the reliance of the team on email for communication and allows information to be accessed and/or searched at any time in the future. The real-time nature of the communication creates efficiency. Slack has also recently introduced a VOIP function, allowing users to phone each other from within the application. The application also moves seamlessly from computer, smartphone, and tablet. As with many of these applications, Slack is **free** to use for most of it's functions with paid tiers for heavy users and additional features.



Yammer (<https://www.yammer.com>) is often described as a corporate version of Facebook since the interface style is quite similar. This similarity has some unique advantages. Since so many people use Facebook in their personal lives on a daily basis the learning curve is often much shorter for people to be comfortable with Yammer. Users of the Office 365 subscriptions packages get access to Yammer for free which is helpful given the wide adoption of Office 365.



Hipchat (<https://www.hipchat.com>) is from Atlassian, the same company that created Jira, so the integration between these platforms is strong. While it doesn't get the same industry fan-fare as Slack, it is very powerful and offers several features that Slack does not yet have. Guest access allows you to add clients, vendors or other third parties to the chat rooms. Hipchat also allows screen-sharing, which Slack is adding, but at this time does not have. Hipchat is also **free** to use, with paid tiers for advanced features.

Video/Voice



For hosting an online meeting for clients or vendors, GoToMeeting (<http://www.gotomeeting.com>) is a solid application. It is extremely reliable and fuss free. Attendees are not required to have anything installed on their machine and even for non-technical users getting access to the meeting is easy. Attendees can use voip function provided to attend with a computer and/or dial in to a conference bridge. There is also a more advanced version GoToWebinar, which has some great audience engagement tools and advanced invitation functions.



Google Hangouts (<https://hangouts.google.com>) is a great **free** video tool for 10 users or less. Hangouts On Air is a more advanced version which allows passive viewing for more than 10 users. Despite the usefulness of hangouts, the program suffers from a lack of vision for what the application is for. Originally it was a part of the Google+ suite. Now it is available stand alone, but the methods of access through apps, or web page, or chrome, and others make the system fairly confusing to use. If you're just meeting with a few people for a meeting or chat it works great, but it's not your best option for large groups or high profile business requirements.



Skype (<http://www.skype.com/>) is widely recognized and used by millions of people everyday. It's voip & video functions are reliable and generally high quality. Skype is best when speaking 1-1 with someone or with a small group, but lacks functionality for organizing a "meeting room" ahead of time to coordinate. It allows conferences up to 25 people, but getting everyone connected is a fairly manual process. Skype for Business (formally Lync) is much more functional for business needs and has some limited integration with the consumer version. Skype for Business is included in most Office 365 packages and works great with the Office eco-system. For example, being able to add an online meeting room to a meeting invite in outlook makes connecting with people online very easy. Skype for business also allows telephony function, so you can call standard phone numbers from within the app. If your business is an Office shop, and especially if you are using Office 365, Skype for business potential should be taken advantage of.



Join.me (<https://www.join.me>) is a great offering for basic video conferences. The **free** version supports up to 10 people. The paid versions support up to 250 people with a host of more advanced features. Join.me is a great free alternative to GoToMeeting if you do not require more than 10 people to attend.

File Sharing

Every organization requires some file sharing for collaboration, approval, and work flow management. Far too many organizations are still in the habit of emailing those documents to each other as a method for file sharing. Using a cloud based file storage is more efficient, secure, and flexible than traditional methods. Most of the file sharing applications install a local client that makes the cloud drive appear as a folder in your computer. This integration makes the system user friendly, which is key for adoption.



Microsoft OneDrive (<https://onedrive.live.com>) is a part of the Office eco-system. The consumer version offers 5GB **free** space. If you are an Office 365 subscriber, you get 1TB of space. One of the unique features of OneDrive is it allows multiple users to edit an Office document/spreadsheet at the same time. One major issue with OneDrive for business is that currently there is no public Mac client. You can still use the webpage to access OneDrive from a Mac, but that limits the usefulness of the system.



Dropbox (<https://www.dropbox.com>) offers 2GB of storage for **free**. Dropbox has seen major success in the consumer space. In fact, this success has led to an issue of "shadow IT." Shadow IT is when users take it upon themselves to install and use tools that are not authorized or supported by the company. There are numerous organizations where individuals have installed Dropbox for their own use in sharing files between devices, co-workers and even clients/vendors. In a sense this trend is helpful, since it demonstrates the desire for these types of solutions. Also, the personal use of Dropbox reduces the training burden on many organizations. Businesses should use Dropbox for business, which offers important features like unlimited file versioning and user security settings.



Box (<https://www.box.com>) provides 10GB of storage **free** for personal use and various paid tiers for personal and business use. Box is considered a key leader in the enterprise storage and management space. It was placed in the magic quadrant by Gartner for this category. Box has a number of more advanced business features than its peers including workflow management and advanced reporting functions.

For Assistance in determining what apps are best for your business needs, contact Todd Kane with Evolved Management Consulting. todd@evolvedmgmt.com or 778.788.9401.