

The 9 SaaS Tools You Need to be Using

In Your Growing Business
in 2023



About Jimmy Newson

Founder: Jimmy Newson Consulting | Moving Forward Small Business.

Senior Advisor | New York Marketing Association

Jimmy Newson is the founder of Moving Forward Small Business, a membership-based digital publishing company on a mission to save a million small businesses from failure by 2050, leveraging technology, innovation, and business strategy. He is also the senior advisor for the New York Marketing Association. He presents workshops and trainings regularly with the NY Public Library, SCORE, Digital Marketing World Forum, DC Start-Up Week, and multiple international SaaS companies.



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FB: [@jimmylnewson](#)

What are SaaS Tools?

SaaS (Software-as-a-Service) tools are applications hosted in the cloud and offered to customers as a subscription service, with no upfront software installation or hardware investment.

Why is it Important to Use SaaS Tools?

It is important for small businesses to use SaaS tools because it can reduce overhead costs, allow for scalability and flexibility, improve customer service, and provide real-time analytics.

How Do You Get Started Using SaaS Tools?

To get started using SaaS tools, small business owners should identify which specific functions need to be automated and research available solutions.

Pros of Using SaaS Tools

These include improved scalability, better security, easier integration with other cloud services, quick updates and patches, and more flexibility in terms of storage capacity. Additionally, you will be able to access your data from anywhere as long as you have an internet connection.

Cons to Using SaaS Tools

There are some potential drawbacks to consider when choosing a SaaS tool including limited control over system upgrades or downtime, reliance on a single vendor for all services, compatibility issues between different vendors' products, and the lack of customization options compared to traditional solutions.



The MFSB Guarantee

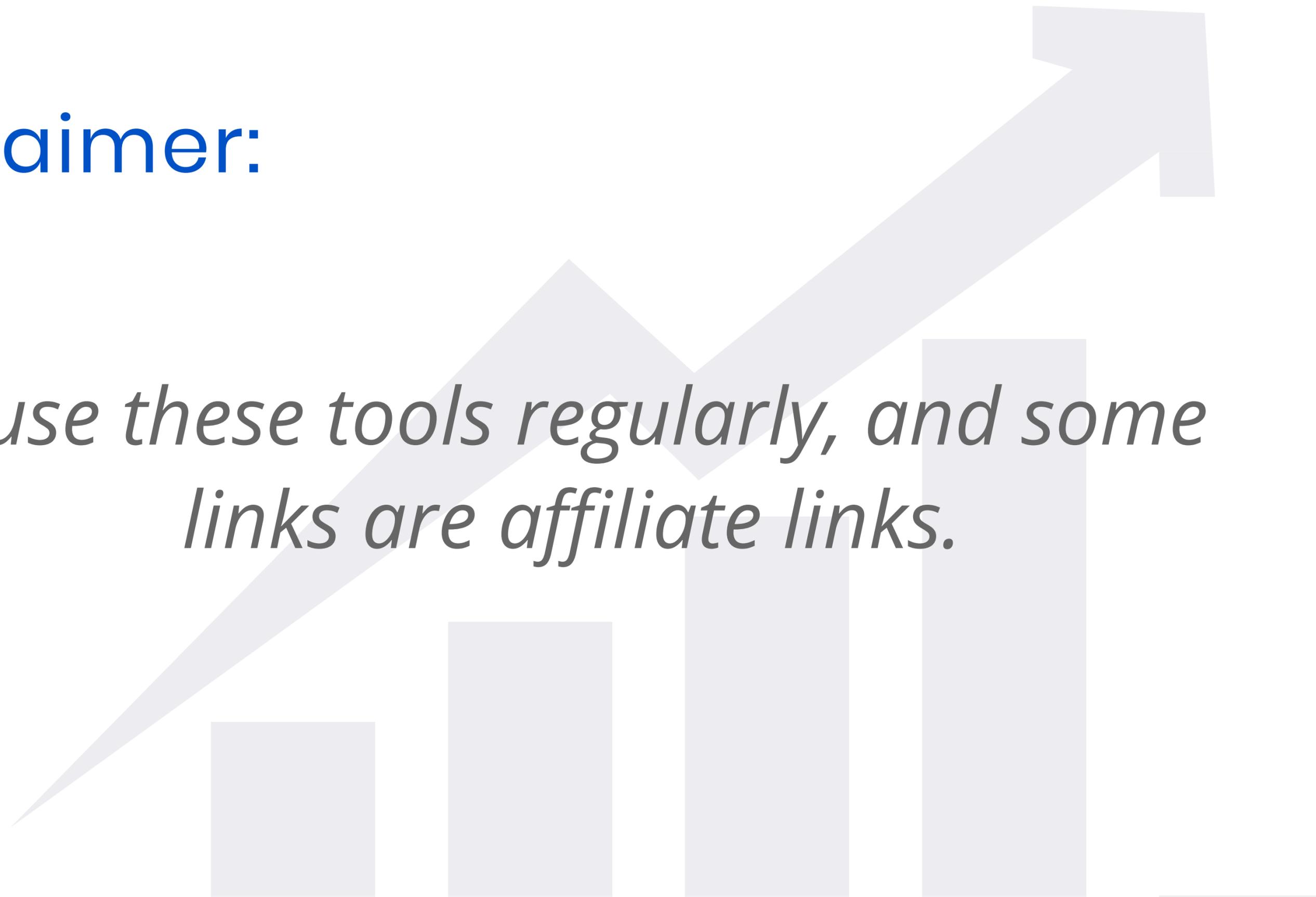
Leveraging technology will become easier if you commit to giving it a try and not shy away from it.

What We'll Learn In This Workshop

- **Improve Efficiency** - Stop wasting time with manual processes and ineffective collaboration
- **Get Ahead of the Curve** - Keep up-to-date with the latest tools and technology to increase productivity, accountability, and bottom line
- **Reduce Stress** - Leverage new tools to reduce time wasted, take away stress and build confidence in the success of your business
- **Deep Dive** – Learn how I leverage SaaS tools for my clients and my business

Disclaimer:

I use these tools regularly, and some links are affiliate links.





Tool: Cascade
Use: Strategy

[Cascade](#) is rated the #1 strategy execution platform. Cascade is an easy-to-use platform for planning, executing, measuring, and adapting strategies.

Check Out This
Tool

#1 RATED STRATEGY EXECUTION PLATFORM

See faster results from your strategy

No more powerpoints and spreadsheets. [Plan](#), [Execute](#), [Measure](#) and [Adapt](#) your strategy in one easy-to-use platform. Get your team moving toward your vision in one central platform.

Book a Demo

Try for Free



Rated 4.8 stars



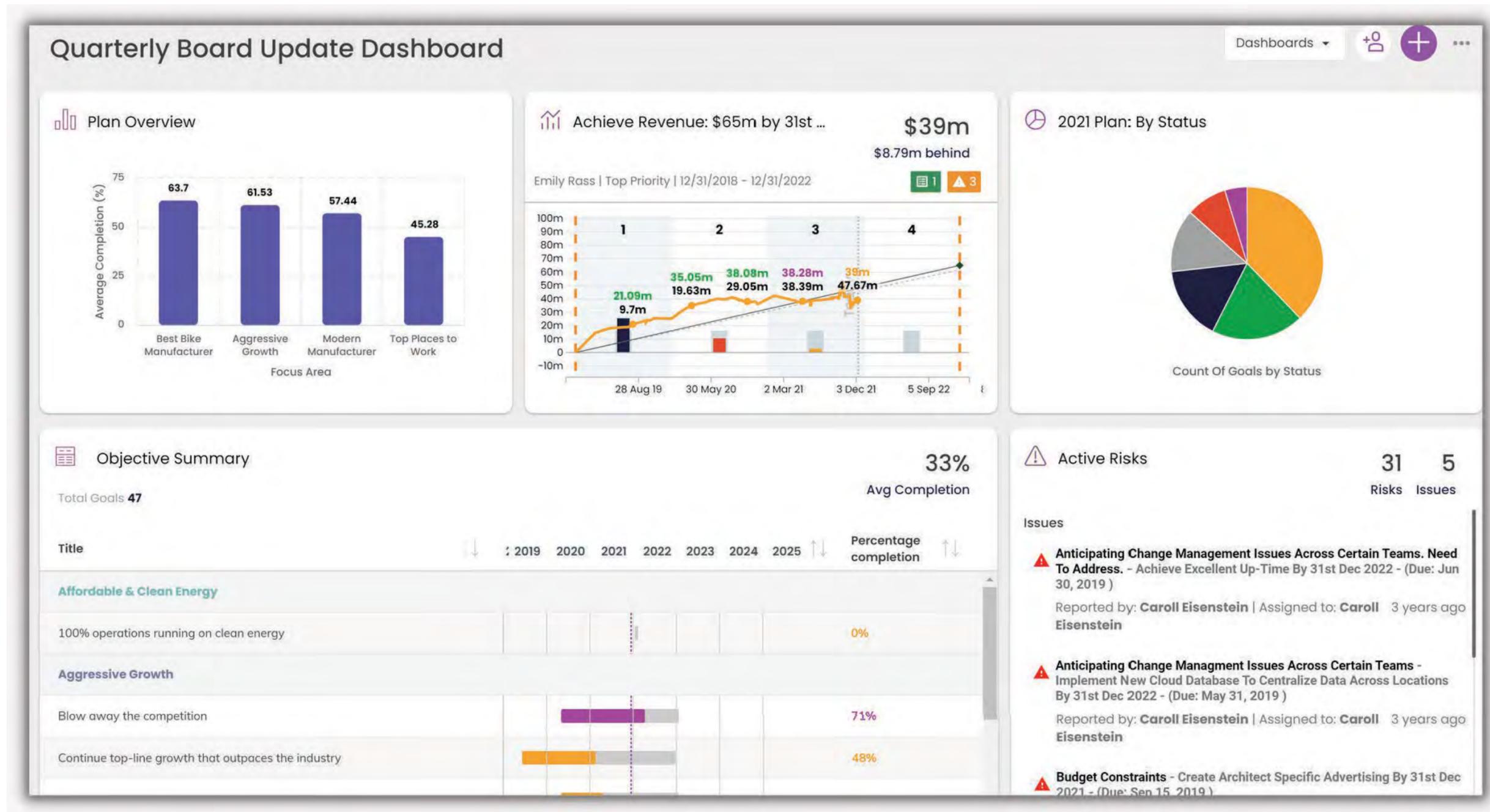
Rated 4.9 stars

What I use This Tool For:

- **Get Focus & Alignment** - Reach faster results from your strategy and have your team stay focused and aligned with Cascade Strategy Software.
- **All In One Place** - Bring your teams together on a single platform that lets you plan, execute, measure and adapt your strategy easily.
- **Say Goodbye to Spreadsheets** - Say goodbye to manually maintaining spreadsheets. Link strategic plans across teams and make sure your funding goes to the right outcomes.

URL:

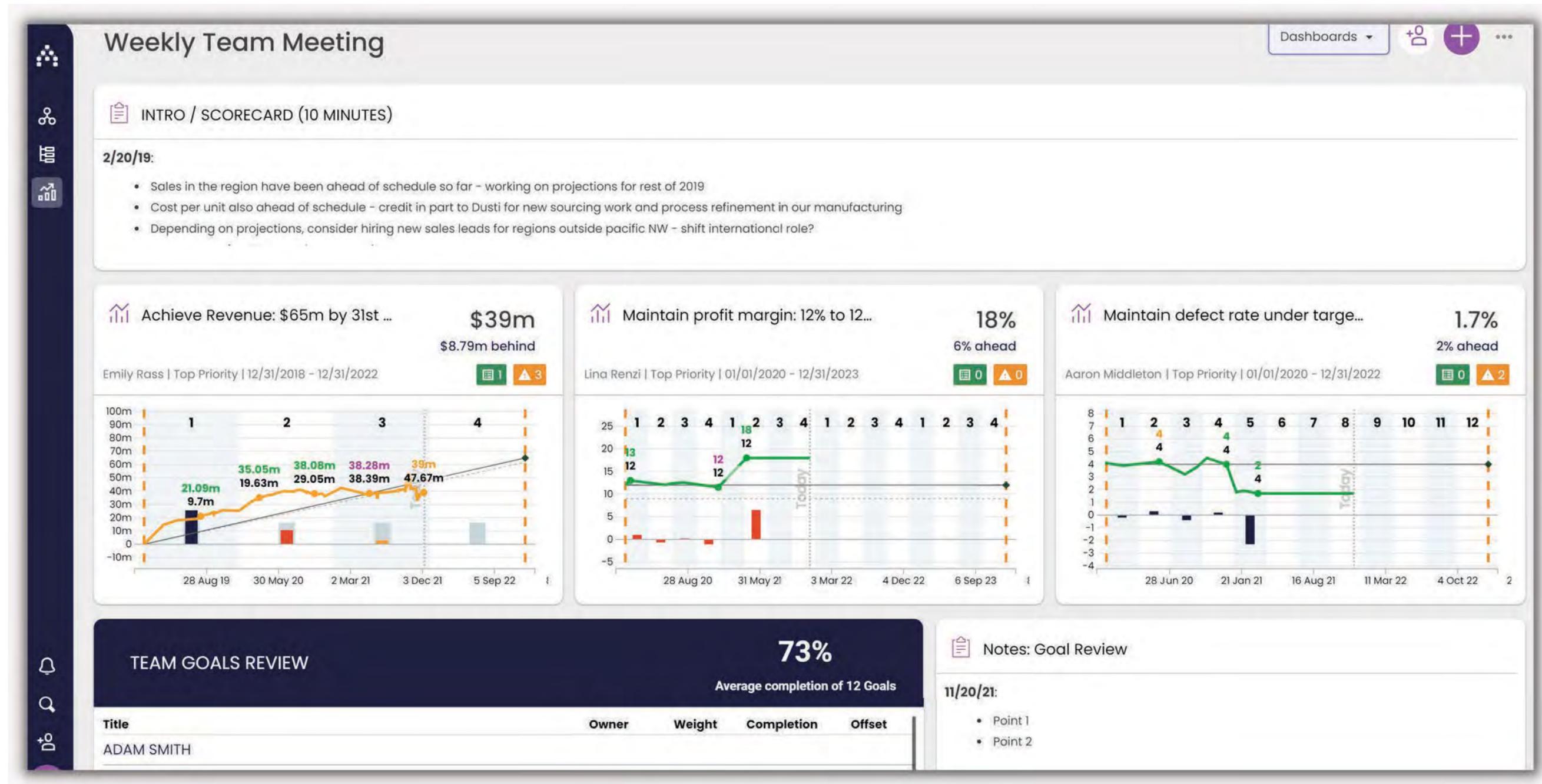
Example Views



Need **INSTANT** insights, and hopefully a way to drill down further as needed.

Hopefully it didn't take long to get your visuals together, either!

Example Views



Need **INSTANT** insights, and hopefully a way to drill down further as needed.

Hopefully it didn't take long to get your visuals together, either!



TOOL TIME



Tool: Sunsama
Use: Time-Blocking

[Sunsama](#) is a powerful tool for guided daily planning, helping businesses stay on track and increase productivity.

The daily planner for busy professionals

Sunsama organizes your work one day at a time. Every day should feel calm and focused.

Try for free

14-day free trial, no credit card required

Check Out This Tool

The screenshot displays the Sunsama interface with a navigation bar at the top containing 'Integrations', 'Pricing', and 'Blog'. The main content area features a large heading 'The daily planner for busy professionals' and a sub-headline 'Sunsama organizes your work one day at a time. Every day should feel calm and focused.' Below this is a prominent orange 'Try for free' button with the text '14-day free trial, no credit card required' underneath. The bottom section of the image shows a preview of the planner's task management interface. It includes a 'Today' section with a 'Focus - Plan' button, and three columns for 'Monday January 11', 'Tuesday January 12', and 'Wednesday January 13'. Each day's view shows a task list with 'Add a task' buttons and specific tasks with time allocations. For example, on Monday, tasks include 'Build daily notes feature' (4:00), 'Mockups', and 'Data model'. On Tuesday, there is 'Answer customer support tickets' (0:30). On Wednesday, the task is 'Upgrade to MongoDB'. A calendar view on the right shows 'MON 11' and a 'Morning routine' task.

What I use This Tool For:

- **Time Management** - Increase efficiency and productivity by creating an optimal plan for each day. Stay organized with all of your work obligations at your fingertips and prioritize the most important tasks first.
- **Automation** - Get reminded of upcoming events and deadlines without ever forgetting or missing a beat. Let Sunsama take care of your calendar, so you can take care of yourself.
- **Customize** - Whether it's allocating specific times to complete each task, customizing colors and font, or utilizing quick input with task cards - Sunsama provides the flexibility you need to get things done in your own style.

URL:

September 2020

1	2	3	4	5
6	7	8	9	10
11	12	13	14	15
16	17	18	19	20
21	22	23	24	25
26	27	28	29	30
31				

- CHANNELS
- # all
 - # Daily Check In
 - # administrative
 - # bugs
 - # code-reviews
 - # customers
 - # deploys
 - # email
 - Show all

- TEAM
- Ashutosh Priyadarshy
 - Bruno Bernardino
 - Joseph Gillaars
 - Travis Meyer
 - Zane Mccaig
 - invite teammates

- CALENDARS
- ashutosh@sunsama.com

all Today

Monday
September 21

Add a task

Sunsama ↔ Todoist Integration Marketing Page

Review Growth Marketers

test mobile nightly

Fixes: Focus Mode, All Day Event Import, Search Results

Todoist Auto Completion

Daily Update

D0/D1 FullStory Sessions

Sponsored by Inyousee

Tuesday
September 22

support tickets

inbound triage

Daily Update

customer feedback review

- churn surveys
- synthesize weekly learning

Wednesday
September 23

inbound triage

Daily Update

Thursday
September 24

inbound triage

Daily Update

weekly founder check in

Tasks Calendar Todoist

Demo

- Google Demo
- Yahoo Demo

Demo Section 1

- Section 1 Stuff
- Section 1 Stuff Again

More Demo

- More Demo 1
- More Demo 2

Welcome

- something

Welcome! Let's get started with a few tips

- Hover over this task & click (i) to view its details
- You can add subtasks here!

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	Saturday	Sunday
	<i>Planning</i>	<i>Prospecting</i>	<i>Sales Calls</i>	<i>Proposals</i>	<i>Internal Meetings</i>		
6:00 AM						OPEN	OFF ALL DAY
6:30 AM	EXERCISE	EXERCISE	EXERCISE	EXERCISE	EXERCISE		
7:00 AM	MIT	MIT	MIT	MIT	MIT		
7:30 AM	MIT	MIT	MIT	MIT	MIT		
8:00 AM	MIT	MIT	MIT	MIT	MIT		
8:30 AM	Email	Email	Email	Email	Email		
9:00 AM	BUSINESS PLAN REVIEW	PROSPECTING	SALES	DISCOVERY	TEAM MEETINGS		
9:30 AM							
10:00 AM	PROGRAMMING	OUTREACH	MEMBERSHIP	MEMBERSHIP	PLAN		
10:30 AM							
11:00 AM	Lunch	Lunch	Lunch	Lunch	Lunch		
11:30 AM							
12:00 PM	Email	Email	Email	Email	Email		
12:30 PM	BUFFER	PROSPECTING	SALES	DISCOVERY	TEAM MEETINGS		
1:00 PM							
1:30 PM	FINANCES	OUTREACH	PROGRAMMING	SPONSORSHIP PROPOSALS	UNIMARKET PROPOSALS		
2:00 PM							
2:30 PM	CLIENTS	BUFFER	BUFFER	SPONSORSHIP PROPOSALS	UNIMARKET PROPOSALS		
3:00 PM							
3:30 PM	Walk	Walk	Walk	SPONSORSHIP PROPOSALS	UNIMARKET PROPOSALS		
4:00 PM							
4:30 PM	Dinner	Dinner	Dinner	SPONSORSHIP PROPOSALS	UNIMARKET PROPOSALS		
5:00 PM							
5:30 PM	Email	Email	Email	Email	Email		
6:00 PM	Training/Leaming	BUFFER	Training/Leaming	Training/Leaming	BUFFER		
6:30 PM							
7:00 PM							
7:30 PM	Open	Open	Open	Open	Open		
8:00 PM							
8:30 PM							
9:00 PM	Open	Open	Open	Open	Open		
9:30 PM							
10:00 PM	Open	Open	Open	Open	Open		

3



Tool: Anyword
Use: AI Content
Writing

[Anyword is an AI Writer Tool](#) that provides business owners with a wide range of powerful tools to optimize their copy.

Check Out This Tool

anyword

Solutions

Use cases

API

Pricing

Copywriting AI with predictable results

Get more conversions and drive more sales with an AI writer that generates and optimizes your copy. Powerful predictive analytics tells you what works before you publish.

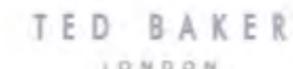
Your email address

Start for free

Or

 Sign up with Google

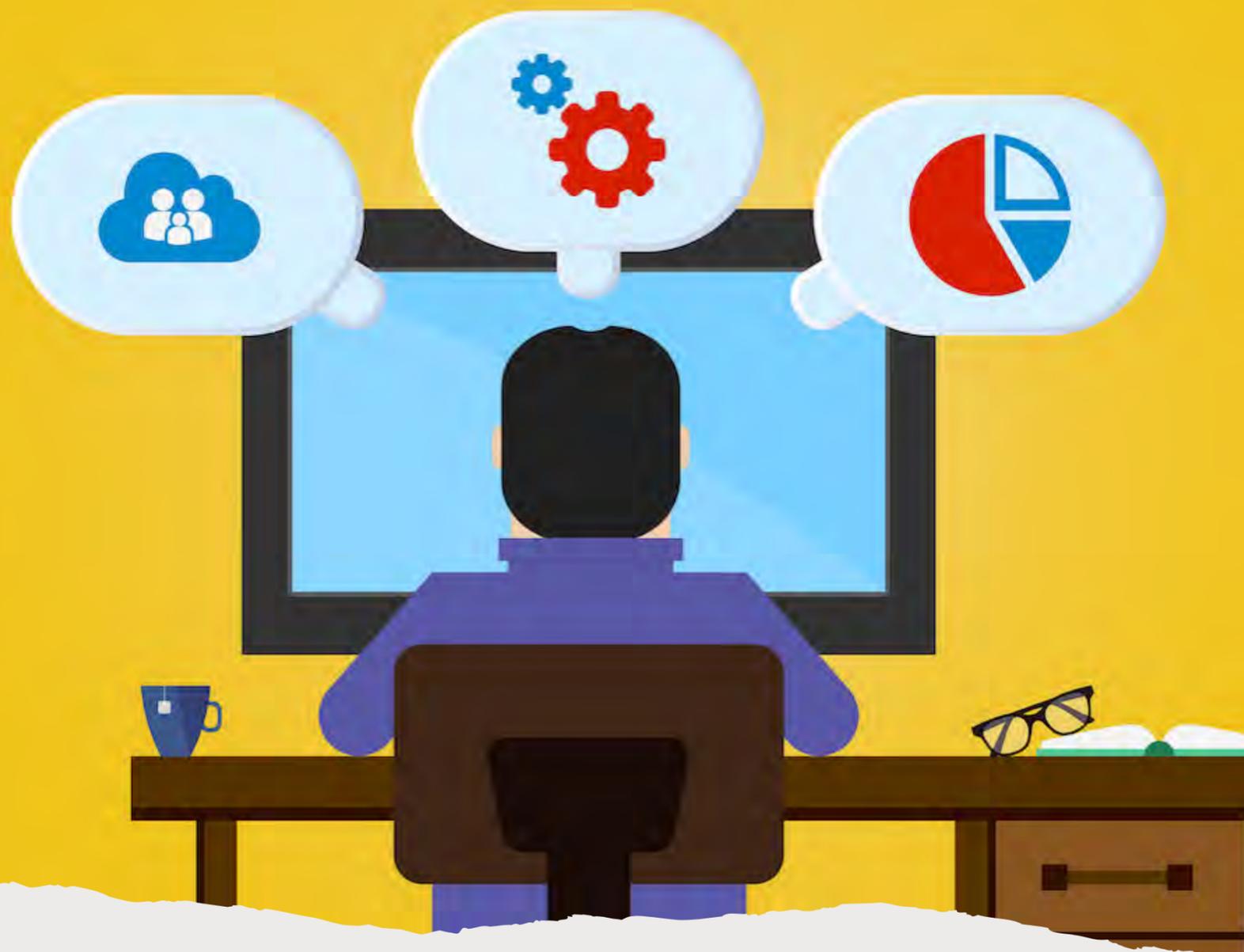
Available in: English, Spanish, French, Italian, German, Chinese [and more](#)



What I use This Tool For:

- **Hassle Free Writing** - Don't waste time crafting your own content or hiring writers - let AI take the hassle out of creating effective copy for your needs.
- **Boost Your Conversion Rate** - Convert more customers with the power of AI writing assistant technology, helping to see an average increase of 30% in conversion rates.
- **Get Results Fast** - Easily generate AI copy with a click, scored and sorted by predicted performance to ensure you're getting the best content fast.

URL:



TOOL TIME

4



Tool: Ahrefs
Use: Website
Performance

[Ahrefs](#) is a marketer's tool of choice and has been used by some of the world's leading companies to gain an edge over their competition

Ahrefs Webmaster Tools

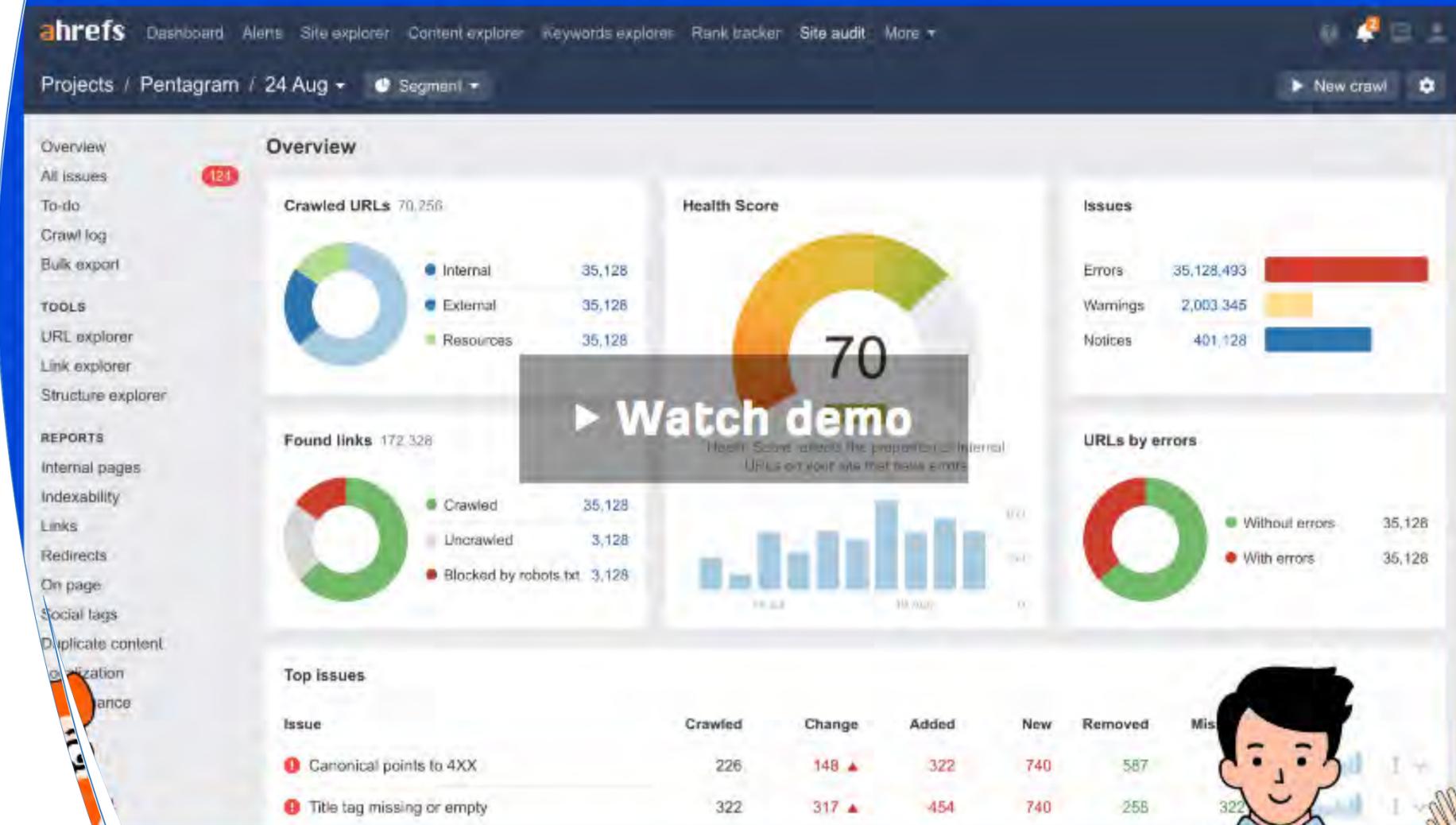
Improve your website's SEO performance and get more traffic from search. Free for website owners.

[Sign up for free](#)

+6,908 users joined AWT in the last 7 days

You'll need to verify ownership of your website to use the tools [?](#)

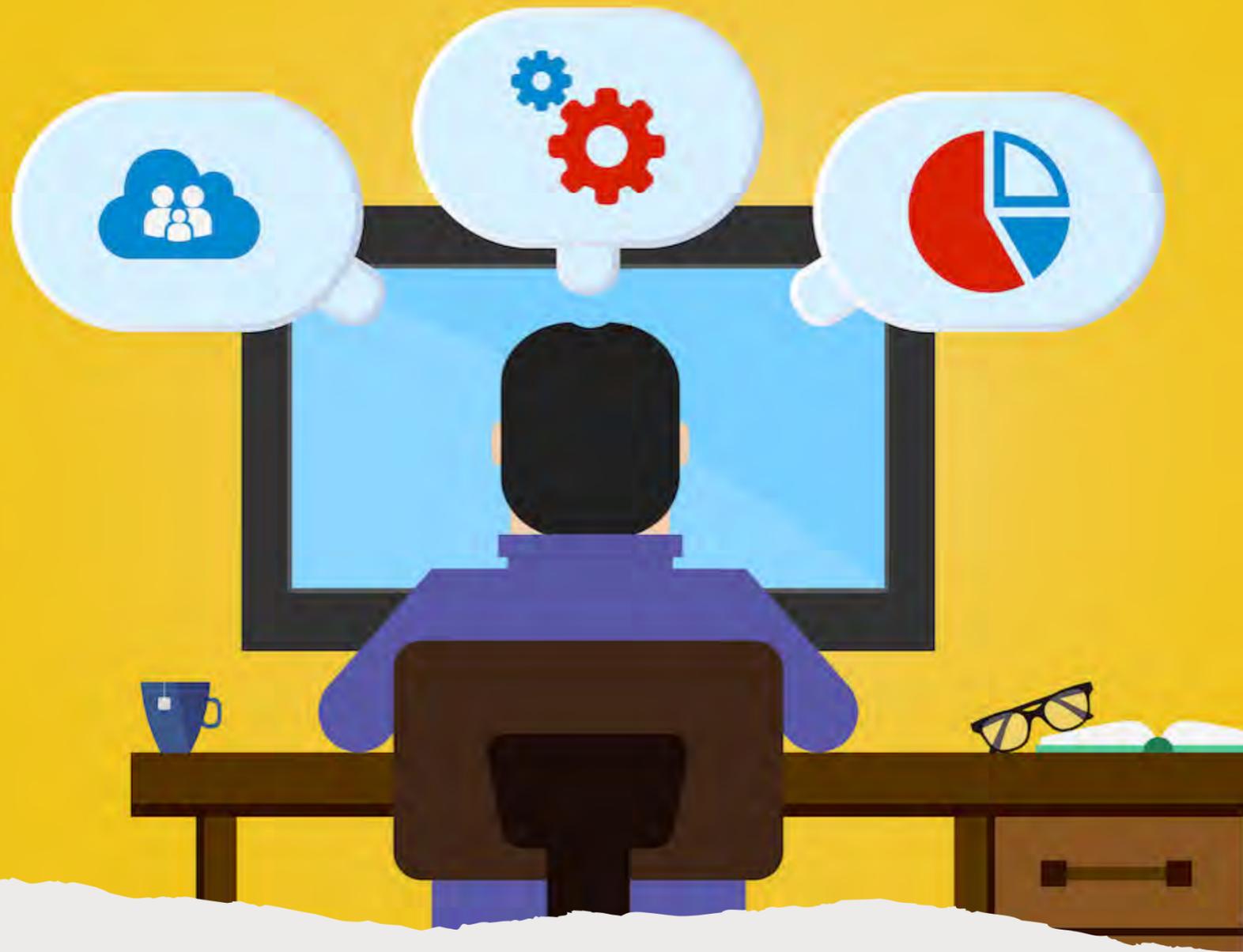
Check Out This Tool



What I use This Tool For:

- **Find Opportunities for Growth** - Quickly uncover opportunities for improving organic traffic with content audits and broken link checks.
- **Stay Up-to-date on Trends** - Keep up-to-date with industry trends using our SERP reports, search volume estimates, and traffic forecasts.
- **Monitor Your Website's Health** - Monitor your website's SEO health and get quick fixes on all issues related to content, link building, and more.

URL:



TOOL TIME

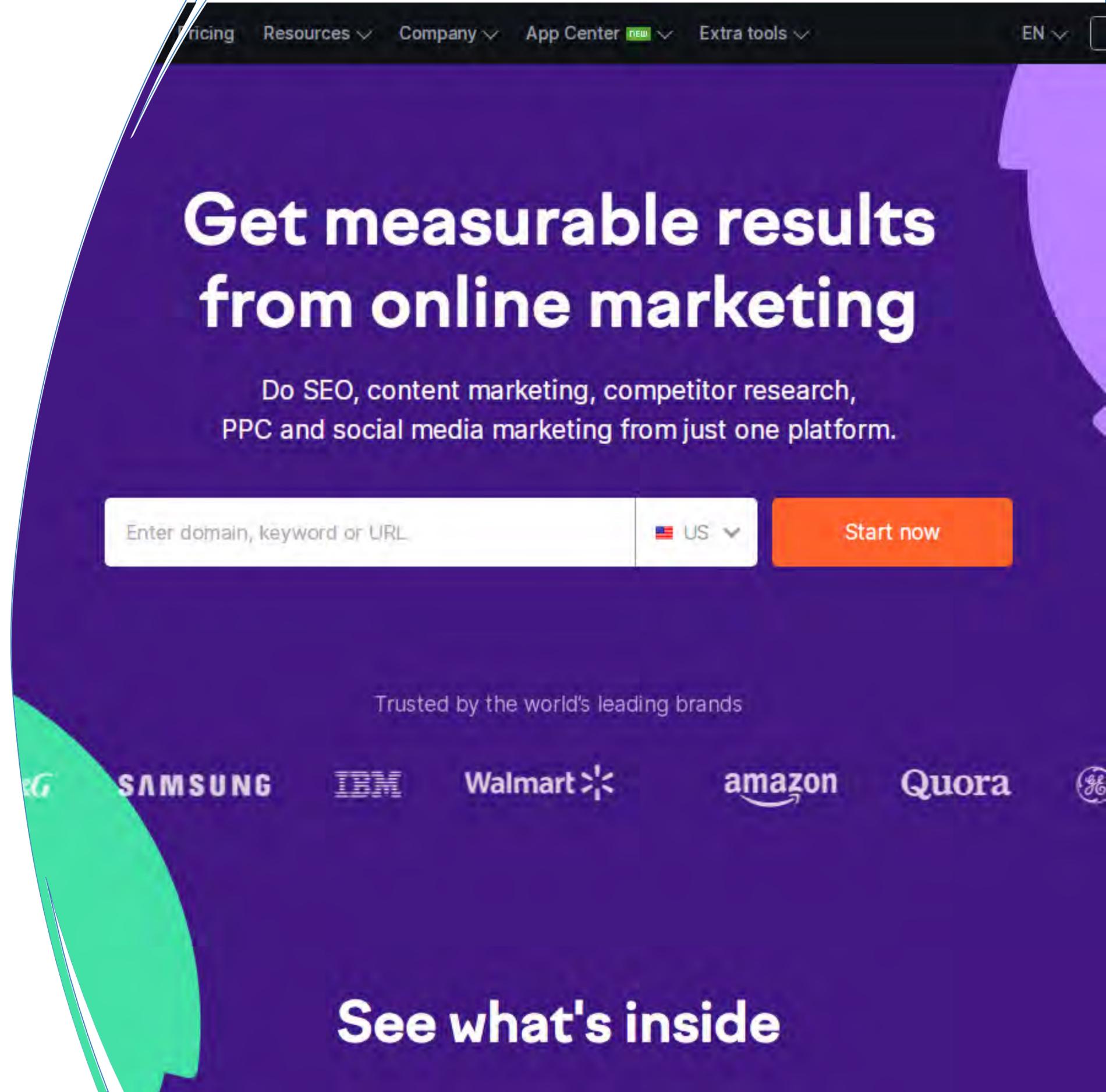
5



Tool: SEMrush
Use: Topic Research

SEMrush helps you increase your reach and develop successful digital marketing strategies using reliable, industry-leading metrics that are used by digital marketers around the world.

**Check Out This
Tool**



The screenshot shows the SEMrush website homepage with a dark purple background. At the top, there is a navigation bar with links for Pricing, Resources, Company, App Center (marked as new), and Extra tools. The main headline reads "Get measurable results from online marketing". Below this, a sub-headline states "Do SEO, content marketing, competitor research, PPC and social media marketing from just one platform." A search bar is present with the placeholder text "Enter domain, keyword or URL" and a dropdown menu for the country set to "US". A prominent orange "Start now" button is located to the right of the search bar. Below the search bar, it says "Trusted by the world's leading brands" followed by logos for Google, Samsung, IBM, Walmart, Amazon, Quora, and GE. At the bottom, there is a call to action that says "See what's inside".

Pricing Resources Company App Center **new** Extra tools EN

Get measurable results from online marketing

Do SEO, content marketing, competitor research, PPC and social media marketing from just one platform.

Enter domain, keyword or URL US **Start now**

Trusted by the world's leading brands

Google SAMSUNG IBM Walmart Amazon Quora GE

See what's inside

What I use This Tool For:

- **Create Valuable Content** - Use data-driven insights to develop content that resonates with your audience, so you can drive more traffic and boost your bottom line.
- **Increase Your Visibility** - Optimize your content to improve search engine rankings and appear higher in SERPs so you can get more organic clicks and impressions.
- **Keep Tabs On Performance** - Get real-time insights into the performance of your content, so you can make adjustments on the fly to ensure you get maximum ROI from your campaigns.

URL:



TOOL TIME

6



Tool: Trainual
Use: Standard
Operating Procedures

[Trainual](#) is the only tool that cuts costs of recruiting, training, hiring, retaining, and ongoing training.

Check Out This
Tool

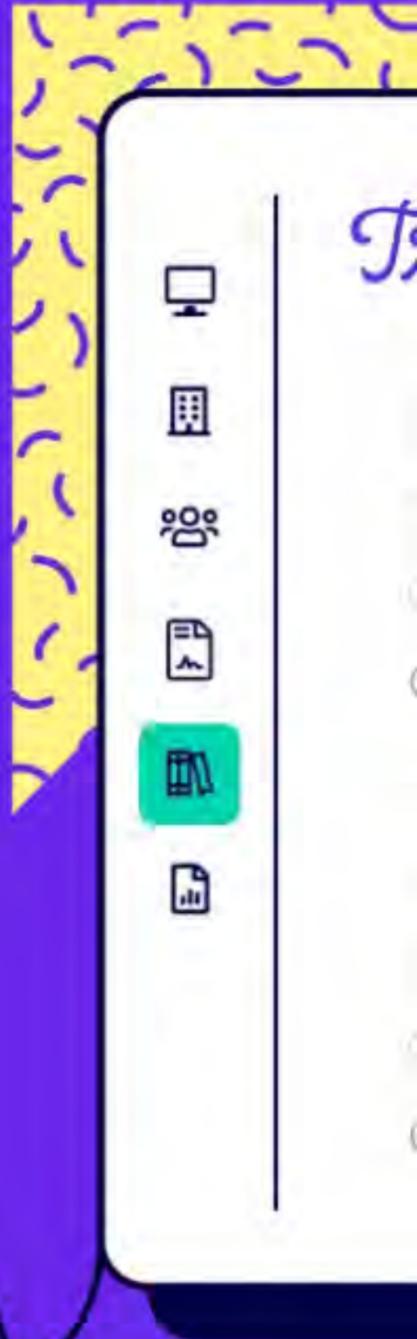
Trainual

How it works ▾

The **training manual** for your whole team

Trainual helps you systemize and scale. Onboarding, training, process docs, SOPs — all the knowledge people need in one easy app 🙌

Try free (no credit card)



What I use This Tool For:

- **Speed Up Onboarding** - Improve time-to-proficiency by centralizing everything new employees need to know. Make onboarding a more pleasant and efficient experience.
- **Manage SOPs & Training** - Use built-in templates and automation to quickly get processes and employee training under control, while being able to track employee progress.
- **Scale Easily** - Avoid chaos as you expand. Automatically duplicate and share process documents, onboarding materials, and more with the click of a button.

URL:

Subjects



Filters

Add Subject

- Dashboard
- Subjects**
- Templates
- Users
- Reports
- My Desk
- Forum
- Library
- Settings

Welcome to Trainual

Published Last updated: 24 minutes ago

Average completion 0%

AW BS AW +3

Company Basics

Published Last updated: 43 minutes ago

Average completion 0%

AW AW AT BS +9

Human Resources

Published Last updated: 43 minutes ago

Average completion 0%

AW AW BS CM

Intro to Sales

Published Last updated: 43 minutes ago

Average completion 0%

Assign Users

My Progress 33%

Media Requests

Social Media Management

Subjects



Search

Filters

Add Subject



Dashboard

Subjects

Templates

Users

Reports

My Desk

Forum

Library

	2020 Trainual New Employee Onboarding (NEO) - Part	Published				
	2020 Trainual New Employee Onboarding (NEO) - Part	Published				
	L&D: Lunch & Learn Archive	Reference	Published			
	Marketing: Team Overview	Published				
	Marketing: Success Stories	Reference	Published			
	Operations: Milestones and Important Communications	Reference	Published			
	Operations: Traveling with Trainual	Published				



Tool: Otter.ai
Use: Transcription

[Otter.ai](https://otter.ai) is a powerful transcription AI technology designed to make conversations more productive and efficient.

Check Out This Tool



Why Otter.ai

Pricing

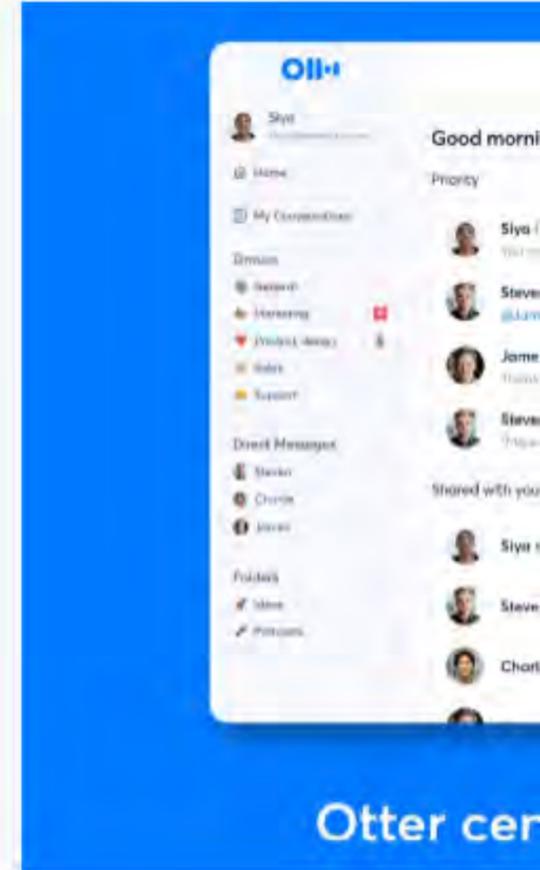
Download

Resources

Capture and share insights from your meetings

Otter records meetings, takes notes in real time, and generates an automated summary to share with everyone and help you remember everything.

Start for Free



Be more producti

work

life

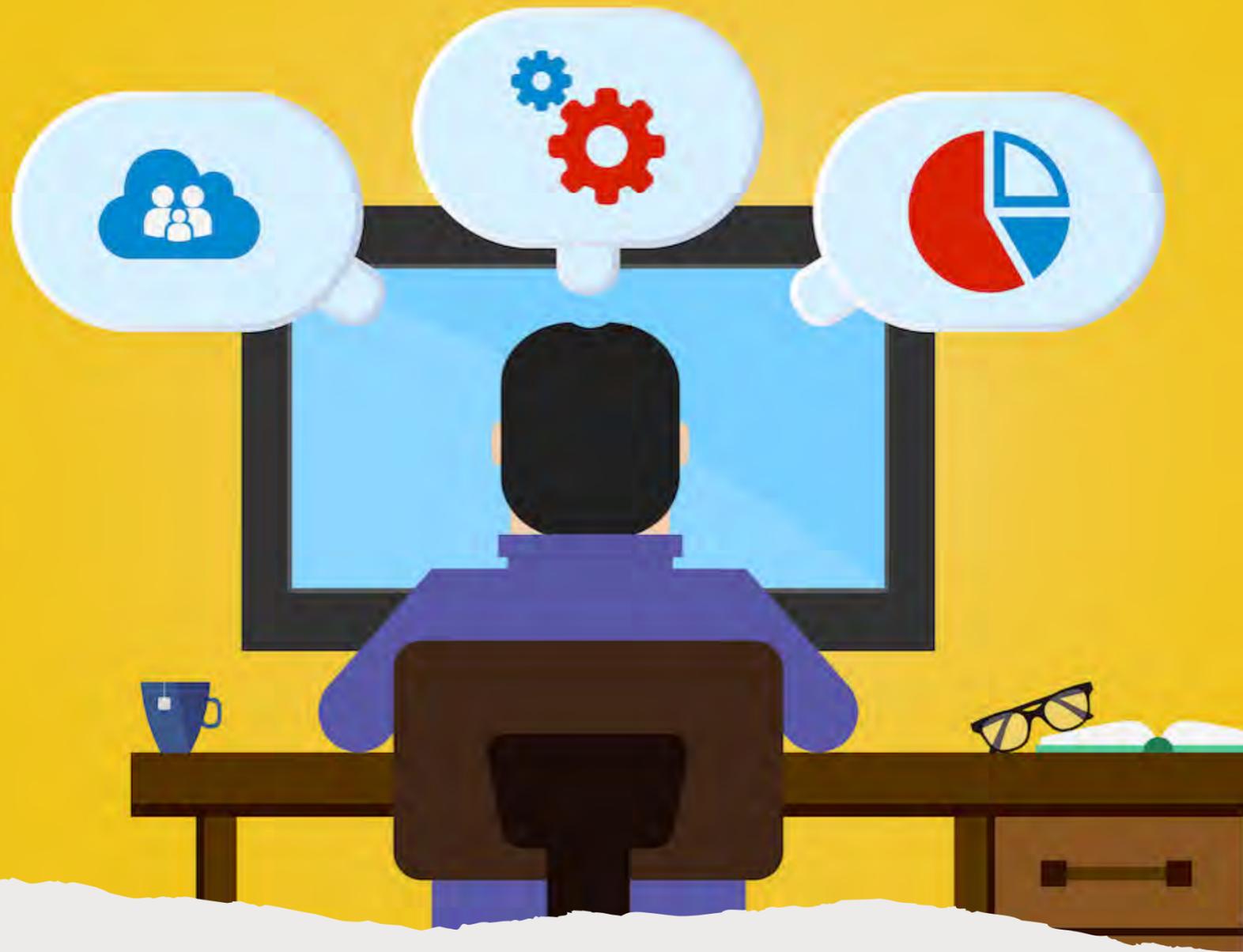
&

sch

What I use This Tool For:

- **Never Miss a Word** - Easily refer back to real time transcription of all your meeting conversations.
- **Search, Access and Share Notes** - Securely store notes from all of your conversations and make them easily searchable and accessible to the whole team.
- **Be More Productive** - Increase engagement and collaboration while avoiding note-taking and free up more time to focus on what matters most.

URL:



TOOL TIME



Tool: Liveplan
Use: Business Plan

[LivePlan](#) is a comprehensive business planning software that can help your business reach its goals and increase its chances of success.

Check Out This Tool

LivePlan

HOW IT WORKS

FEATURES

PRICING

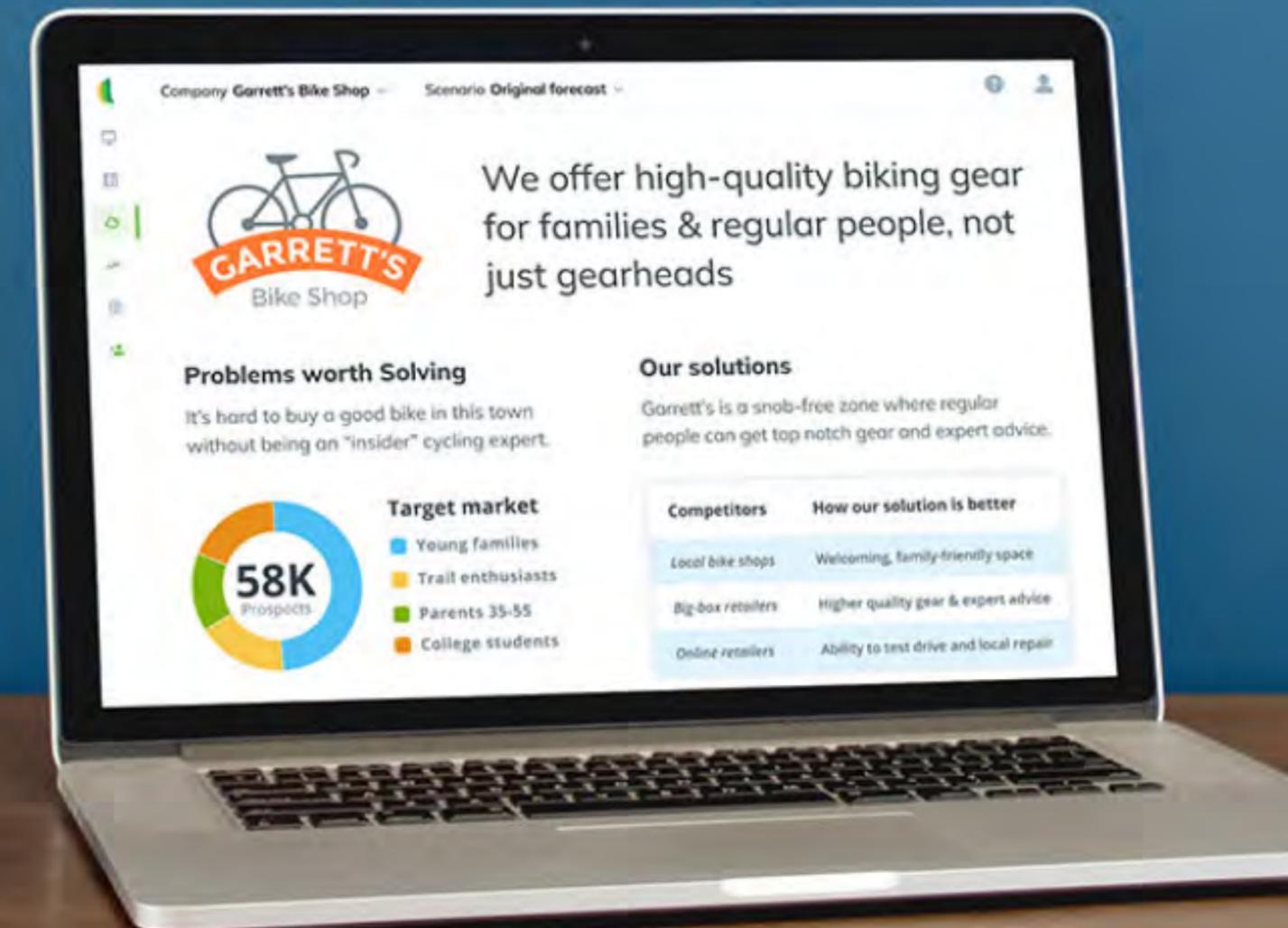
CUSTOMERS

Plan, fund, and grow your

Easily write a business plan, secure funding, and get insights to h

VIDEO TOUR

START YOUR PLAN



What I use This Tool For:

- **LivePlan Makes Planning Easier** - Put the power of data in your hands to accurately assess your business situation and craft a strategic plan with greater accuracy and confidence.
- **Get Started Fast** - With LivePlan's simple step-by-step guide, you can get up and running quickly—all without complicated templates or complicated software.
- **Reap the Rewards** - Studies show companies that plan and track against their plan grow 30% faster than those that don't. Grow faster with LivePlan's built-in tools, resources, and personalized guidance.

URL:

- Executive Summary
 - ↳ Opportunity
 - ↳ Expectations
- Opportunity
- Execution
- Company
- Financial Plan
- [Edit Outline](#)

Executive Summary

Opportunity

Problem

[Edit](#)

The metric that stands out the most for me regarding small businesses is 70%. According to data from the Bureau of Labor Statistics, that's the number of businesses that fail between their 1st and 10th year. That's a lot of broken dreams.

After having countless conversations with other organizations that work with and support these small businesses, the recurring theme for their failure or soon-to-be failure is their need for a solid business plan and business strategy. We hear that business strategy is the missing ingredient in most programs created by the government, nonprofits, and private organizations to support small businesses. The plan is the "How," while the strategy is the "What." We are providing the "What." Why? Because the "What" dictates the "How."

To break it down further, approximately 20 percent of small businesses fail within the first year. By the end of the second year, 30 percent of businesses will have failed. By the end of the fifth year, about half will have failed. And by the end of the decade, only 30 percent of businesses will remain — a 70 percent failure rate. We want to be the strategic growth partner to our small business community for the next five to ten years, helping to reduce that failure

Financial Tables

Profit & Loss

Balance Sheet

Cash Flow

Revenue

Direct Costs

Personnel

Expenses

Assets

Taxes

Dividends

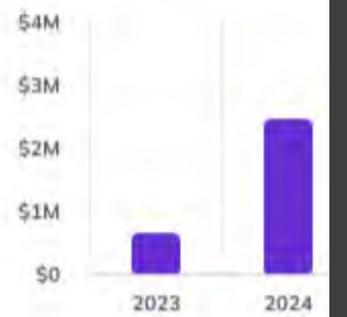
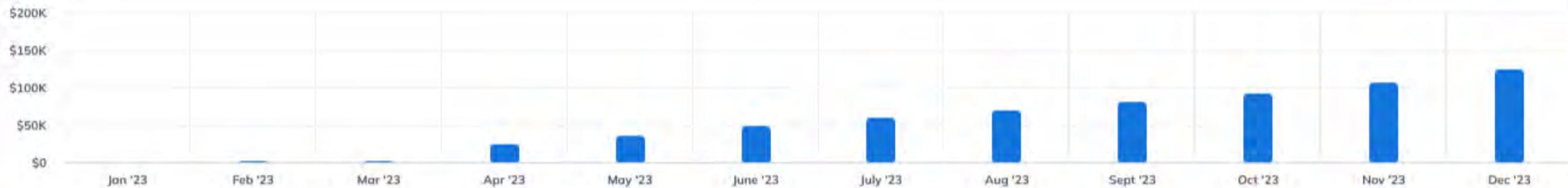
Cash Flow Assumptions

Financing

Revenue

Hide Charts

Show Instructions



Add Revenue Stream

Monthly

Revenue	2023	2024	2025
Starter Membership	\$41,541	\$148,997	\$225,721
Professional Membership	\$103,935	\$372,792	\$564,755
Expert Membership	\$46,856	\$192,267	\$336,439
Impact Influencer Membership	\$112,500	\$465,000	\$825,000
Event Sponsorship	\$8,333	\$100,000	\$100,000
Webinar Sponsorship	\$90,000	\$120,000	\$120,000
Yearly Sponsorship	\$0	\$250,000	\$250,000

9



Tool: Doodle

Use: Mass Scheduler

[Doodle](#) is the fastest and easiest way to schedule anything. Professionals of all types – from entrepreneurs to freelancers, to small teams, to large enterprises – can use Doodle to get more done.

**Check Out This
Tool**



Product ▾

Use cases ▾

Professional ▾

Pricing

Learn ▾

Contact

Professional scheduling made easy

Doodle is the fastest and easiest way to schedule anything – from meetings to the next great collaboration.

Try it free →

No credit card required.



Trusted by 70,000+
companies



2+ million meetings scheduled
last month

What I use This Tool For:

- **Say Goodbye to Hassle** - Skip the back-and-forth emails to schedule a meeting. Let Doodle automate the whole process, from the invite to the video link.
- **Your Team on Board** - Get all your team in the same place with video links automatically added to virtual meetings scheduled with Doodle.
- **All in One Place** - No need for extra steps, connect Doodle directly to your calendar, so everything is all in one place.

URL:

Availabilities

✓ yes ✓ if need be ✗ cannot attend ? pending

	FEB 6 MON	FEB 6 MON	FEB 7 TUE	FEB 7 TUE	FEB 8 WED	FEB 8 WED	FEB 9 THU
	5:00 PM - 6:00 PM	6:00 PM - 7:00 PM	5:00 PM - 6:00 PM	6:00 PM - 7:00 PM	5:00 PM - 6:00 PM	6:00 PM - 7:00 PM	5:00 PM - 6:00 PM
Participants	7	13	8	9	8	9	9
Jimmy Newson You Edit	✓	✓	✓	✓	✓	✓	✓
RS Rosalyn	✗	✗	✗	✗	✗	✗	✗
I ismael	✗	✗	✗	✓	✓	✓	✗
Jeffery	✗	✓	✗	✗	✗	✗	✗
K Kimberley	✗	✓	✗	✓	✗	✓	✗
M mine	✗	✗	✓	✗	✓	✓	✓
JC jan	✓	✓	✓	✗	✗	✗	✗

Book it

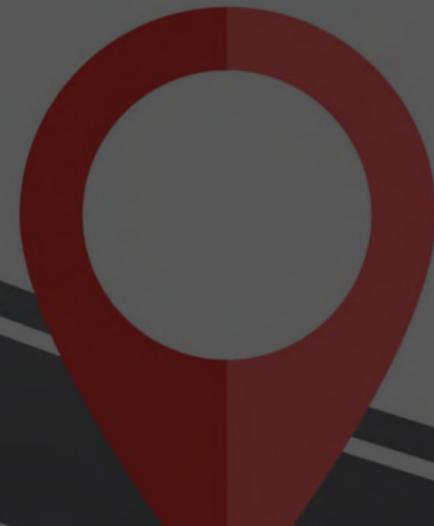
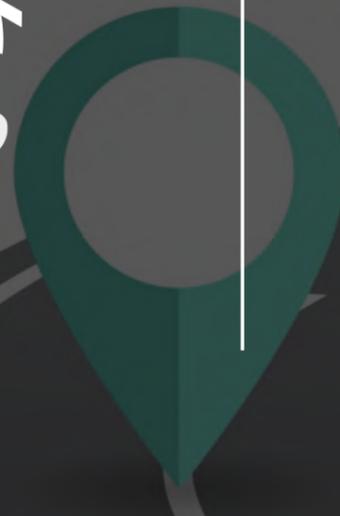
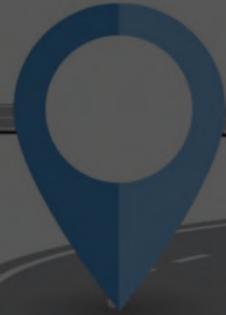
Purnima from Doodle
iCloud calendar connection is Jimmy 🌟 We now support Ap

ROW
M
SOLVE

WHIL
ST
W



Honorable Mentions



Honorable Mentions



Mind Mapping Tools:

If you want to organize your thoughts and tasks visually, mind mapping tools like [Coggle](#) and [Mindmup](#) are excellent options. With these tools, you can create maps of your ideas and objectives and track progress over time.



Video Conferencing Solutions:

With the increasing prevalence of remote work and virtual meetings, having a reliable video conferencing solution is a must. Zoom and Google Hangouts are two popular choices that provide features such as screen sharing, document collaboration, and recording capabilities.



Content Management System:

For businesses looking to manage their content more effectively, content management systems like WordPress and Shopify can help. These platforms provide easy-to-use templates, helpful analytics, and the ability to create custom content.

Honorable Mentions



Project Management Apps:

If you need help keeping track of tasks, resources, and deadlines, project management apps like Trello and Asana are great options. These apps provide an intuitive interface for managing projects and ensure everything is organized in one place.



Customer Relationship Management:

Additionally, having a Customer Relationship Management (CRM) platform is essential for any business looking to increase customer satisfaction and streamline their workflow. CRMs like Salesforce and HubSpot provide powerful insights into customer data and allow businesses to easily track customer interactions, manage sales pipelines, and close deals quickly.

Staying up-to-date with the latest tools and technology can help you increase productivity, accountability, and your bottom line.

[Read Blog Post](#)

The screenshot shows a web browser window displaying a blog post. At the top, the browser's address bar shows the phone number 616-643-7881 and the email address info@movingforwardsmallbusiness.com. The website's navigation menu includes links for Home, About Us, Events/Programs, Resources, and #MFSBiz Blog. The blog post title is "The 9 SaaS Tools You Need to be Using in Your Growing Business in 2023" by Jimmy Newson, dated Jan 27, 2023, with tags for Business Strategy, Small Business, and Technology, and 0 comments. The featured image depicts a person sitting at a desk with a computer monitor, with three thought bubbles above their head containing icons for a cloud with people, gears, and a pie chart.

**Want help leveraging
technology to grow your
business?**



jimmy@movingforwardsmallbusiness.com



The Strategy
Alignment &
Execution
Membership

[Learn More and
Join](#)

Each Month is Broken into a 4-part Framework...

- We release a MONTHLY ACTION PLAN as a training inside the portal
- We host a LIVE TRAINING CALL on the action plan to answer questions and outline the implementation strategy
- We host a LIVE IMPLEMENTATION TRAINING that spans 5-7 days where we DO THE WORK TOGETHER to get you results
- We host a COFFEE, COACHING, & CONVOS CALL where you can join in and ask any questions that you have from the work you've done for the month

Of course, this is all tied with a pretty bow in a private community where you can connect with other "strategy-aligned professionals" that are purpose and impact driven...



#MFSBiz Wants to Be Your Strategic Growth Support System

Get started with building a more resilient business through real support, actionable events, impactful training, and powerful networking opportunities. This is out-the-box thinking at its best. Check Out Our Available Membership Levels & Pricing

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