



Startup Success

AUTOMATION
TOOLKIT

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MODULE 6 // Organize, Automate, and Outsource

Automation Toolkit

Automate Your Project Management

Trello

<https://trello.com>

Starts at free.

Trello allows you to organize projects by creating boards, lists, and cards on those lists. Open a card and you can add comments, upload file attachments, create checklists, add labels and due dates, and more.

Asana

<https://asana.com/>

Starts at free.

An easy way to manage team projects and tasks. Asana gives you everything you need to stay in sync, hit deadlines, and reach your goals. Use the "Timeline" feature to create a plan that shows you how the pieces of your project fit together, and helps you keep work on track as things change.

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Podio

<https://podio.com>

Starts at free.

Podio is a work management solution that allows businesses to completely customize and integrate their management software.

Basecamp

<https://basecamp.com/>

\$99/month

Basecamp helps you manage projects and tasks, facilitates team communication, and also provides up to 500 gb of file storage.

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Automate Your Social Media

Buffer

<https://buffer.com/>

Starts at free.

Buffer is a software application for the web and mobile, designed to manage accounts in social networks, by providing the means for a user to schedule posts to Twitter, Facebook, Instagram, and LinkedIn, as well as analyze their results and engage with their community.

Hootsuite

<https://hootsuite.com/>

Starts at free.

Hootsuite provides a dashboard that allows you to manage multiple social media accounts and profiles simultaneously.

Planoly

<https://planoly.com>

Starts at \$7/month

Planoly helps you manage, automate, and optimize your Instagram account, including features such as pre-scheduling posts, auto-posting, analytics, and research tools.

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Later

<https://later.com>

Starts at free.

Allows you to visually plan and schedule your Instagram posts.

Tailwind

<https://www.tailwindapp.com/>

Starts at \$9.99/month

My preferred tool for Pinterest automation. Tailwind allows you to schedule pins, discover content, monitor your Pinterest account, join “tribes” of bloggers, post on group boards, and monitor your Pinterest account and results.

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Automate Your Email Marketing

Convertkit

<https://convertkit.com/>

Starts at \$29/month

The email marketing software that I use and love, Convertkit allows you to effectively manage your email list and implement powerful segmentation and marketing automations.

ActiveCampaign

<https://www.activecampaign.com/>

Starts at \$17/month

A comprehensive marketing automation tool that provides email list management, as well as sales management and CRM services.

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Automate Your Customer Management

Pipedrive

<https://www.pipedrive.com>

Starts at \$15/month

Pipedrive enables businesses to plan their sales activities, monitor deals, analyze sales data and generate visual reports.

Agile CRM

<https://www.agilecrm.com>

Starts at free.

Agile CRM is an all-in one marketing automation and CRM tool that helps you avoid data leaks and enable consistent messaging.

Hubspot CRM

<https://www.hubspot.com/>

Starts at free.

HubSpot offers a full stack of software for marketing, sales, and customer service, with a completely free CRM at its core.

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Automate Your Scheduling

Acuity

<https://acuityscheduling.com/>

Starts at \$15/month

Calendly

<https://calendly.com>

Starts at free.

Automate Your Ecommerce

Shopify

<https://www.shopify.com>

Starts at \$29/month + transaction fees

ShippingEasy

<https://shippingeasy.com>

Starts at free.

Easily print shipping labels, process orders, and automate tracking.

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Automate Your Bookkeeping

Quickbooks

<https://quickbooks.intuit.com/>

Starts at \$20/month

Xero

<https://www.xero.com/>

Starts at \$9/month

Freshbooks

<https://www.freshbooks.com>

Starts at \$15/month

Wave Apps

<https://www.waveapps.com/>

Starts at free.

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Make Micro Connections

IFTTT: If This Then That

<https://ifttt.com>

Free

A completely free software platform that connects apps, devices and services from different developers in order to trigger one or more automations involving those apps, devices and services.

Zapier

<https://zapier.com>

Starts at free.

Zapier helps you connect a variety of apps and automate your workflow.