

TECHPRENEUR INTERVIEWS

What's it like to run a tech startup?



K.N. KUKOYI

TECHPRENEUR INTERVIEWS

Techpreneur Interviews

Author K.N. Kukoyi

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DEDICATION

Thanks to all the entrepreneurs featured in this book for their time and generosity in sharing their experiences.

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SECTION 1

Techpreneur Interviews

INTRODUCTION

Over the last six months I've had the pleasure of speaking with technology entrepreneurs from the USA, Canada, and Europe. Among them were full-time techpreneurs, bootstrapped businesses, a side-hustler, and entrepreneurs that have graduated from accelerator programmes. You'll find my interviews with them in this book.

This book also includes interviews with other entrepreneurs, originally featured in the book *Entrepreneurial Espresso*, including course creators, bloggers, and gig workers based everywhere from Europe to Thailand. Each conversation offers different insights into the "entrepreneurial experience," as well as a look at the tools and tech they use to run their businesses.

When you review how others manage their business lives it is only natural to reflect on how you manage yours, and the type of entrepreneur that you want to be. I hope you will find it valuable to consider each individual's philosophies and perspectives, how they approach what they do, and to hear about their highs *and* lows.

The interviews cover a range of topics, and you'll find answers to the following questions:

- How long does it really take to become profitable, and how do other entrepreneurs get from zero to notable success?
- What types of marketing and advertising are best for small businesses and startups?
- What tools and resources do other entrepreneurs rely on?
- What challenges, and "highs and lows" do other startups and small business owners experience, and what would they change if they could start all over again?
- How do other startups manage their finances?

This book also contains sample chapters from several of my software survival guides, including *Don't Hire a Software Developer Until You Read this Book*, and *Entrepreneurial Espresso*.

About the author

If you haven't come across me before, I'm K.N. Kukoyi (Kay), the founder of Purposeful Products. I've published 5 business books which can be found on, and offline. I started my career in the field of IT software delivery in 2004, working on multi-million-pound web and mobile projects for publicly listed companies.

Purposeful Products works with entrepreneurs, small businesses, and startups to help them translate their ideas into web and mobile apps. We make it less risky, confusing, and daunting to get started, and support our clients in the management of their software development, project management, and product management processes so they can successfully get from "idea to launch."

We deliver a guided experience using books, toolkits, and courses, and for those who seek a personalised service, we offer step-by-step practical support via our call and service packages, so clients have help at hand as they build their tech businesses.

Well, that's all from me. This isn't going to be a lengthy introduction.

I hope the interviews give you food for thought!

With my best wishes,

K.N. Kukoyi

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You can book a free appointment to talk to us via our Calendly appointment booking page:

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Email us with questions (or just to say hi!) at: hello@purposefulgroup.com.

Follow us on [Twitter](#) – for business and marketing tips, tech news, and interesting stuff.

Take a look at the Purposeful Products Blog.

Keep an eye on the [blog](#) – we publish new content every 2 weeks on a Thursday, although we've taken a short break to get this book published!



Courses and Techpreneur Toolkits are on the way, and we have plans for a techpreneur membership and mastermind group, so check our website for more details. Alternatively, email us with **Keep me updated** in the subject and we'll let you know when we're ready to launch these new ventures!

You can find out more about our services here: <http://beacon.by/purposeful-products/our-services>.

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CHAPTER 1

KYLE RICHEY, "HOW TO BUILD A GOAL SETTING APP."

Kyle Richey, is the CEO of *Strides*, an iOS and web app with rave reviews in Apple's App Store.

Welcome Kyle. Thanks for joining me on the Purposeful Products Blog!
Sure!

How long have you been an entrepreneur?

I started my first business in July of 2006.

What's your background?

I was getting a Bachelor's degree in Systems Engineering, set to graduate in 2008 at the bottom of the recession. Since I had been making some money from my online business (very little, but enough to pay some bills), I decided to double down and focus on building my business full-time, rather than attempt to get a job. Now it's been over 11 years and I'm proud to say that I've never had a job or even filled out a resume. :)

Straight out of college and a business owner already! That's an interesting path and I wonder whether it will become the norm in years to come...

Tell us about your app, Strides.

Something as important as building good habits and tracking important goals is much more difficult than it needs to be. So, in 2012 I started building this ambitious service to make it all simpler... while maintaining an insane level of flexibility. It's come a long way since then, but I'm excited about everything we have on the roadmap to keep making it better for everyone.

The app motivates and encourages by keeping track of users' current *and* best ever streaks of success in changing a habit, or working towards a goal.

It also shows how close you are to completing your goal.

Take a look at Kyle's screenshots of his app - you'll need to pick some attractive screenshots to showcase your own app, along with a pitch / bullet

pointed summary, and description of your product's benefits that you can use for App Store Optimisation (ASO), and to include on your website.



The Strides App - iOS version

Did you have any experience of building apps before you built Strides?

Yeah, I designed and helped build a few simple apps in the first few years after the App Store launched, but none of them went anywhere because they weren't set up for success:

- There wasn't a good business model
- They were small markets
- There wasn't a big enough problem to solve, etc.

Those are really critical items.

Because it's so important, a business plan is highly recommended.

The key reason? In order to create a plan you'll need to think carefully about many aspects of your business.

This time for reflection *almost always* surfaces important points you might otherwise have missed!

Here's a business model template you can use to make sure that your bases are covered.

The modern style of "lean" business plan is short, sweet and to the point. Say goodbye to the traditional 30+ page tomes (they're probably the reason why a shockingly small percentage of people create a business plan):

<http://www.witszen.com/wp-content/uploads/2013/05/Business-Model-Canvas.png>.

How did you first come to recognise that there was a problem that you could solve with your app?

I kept hearing people complaining about New Year's Resolutions not working, and it felt so sad. Why is it so difficult for us to set a reasonable goal for the year and actually achieve it? Isn't that what life is all about, making meaningful progress on the things we care about, growing?

For sure! What initially made you think - "Whoop! This could be something!"?

When I created the first version it got a decent amount of traction early on, and even though v1.0 was awful...seriously - it really resonated with people. I remember getting an email from someone saying it helped them break a bad habit they had for years, and I knew it was worth pressing on.

That is powerful feedback! So, what was involved in doing this?

Phew! I've been working an average of 20+ hours per week on Strides for over 6 years, so that's at least 6,000 hours of work from me, and I don't even do the development for iOS, Web or Android. I've invested over \$300,000 in the development so far. It has literally been the hardest thing I've ever done - even harder than having two toddlers, ha-ha - but I love it.

It's so great that you shared that dollar amount for readers. Thank you.

It's important to set a proportion of your profits aside as your business grows so you can continue to maintain and develop your product.

In *Don't Hire a Software Developer Until You Read this Book*, I recommend that readers ringfence funds for infrastructure – servers/ database storage, etc. and application monitoring, automated testing, and source code / release management software. You can't just spend 100% of your money on features. The foundations of the house need investment too, not just the parts you can

see, but the underlying parts too.

Once you launch customers will make demands. They'll have ideas, requests, bugbears... You'll need to listen and respond to their needs, and have some budget set aside for new features. It will be important to analyse feedback, user trends and data about your customers, so you can work out the best and most profitable actions to take to maintain your existing customer base, and win new customers.

How did you identify the correct target market to suit your product?

This one's tricky. I definitely wouldn't recommend building something for "everyone" like we did. Find your niche for sure.

The purpose of Strides is to make it flexible enough to track absolutely any goal or habit, so I knew going into it that we couldn't possibly have one specific target market, so instead we're targeting a mindset: people that want to track things to improve them and appreciate the progress they've made. I guess the quickest way to sum it up would be to say this was a "scratch your own itch" business that has naturally evolved over time.

Was there a transition to making sure you were marketing your “solution” to the right audience?

Not really. Since I was building it for myself originally, I just kept getting more requests from people wanting more flexibility, and did my best to filter things out and focus on the most impactful additions.

Were you able to get product feedback before launching?

No, but I really wish I did. I didn't even show people a prototype before development.

Big mistake that wasted tons of time.

Thanks for sharing that. It's so important that people new to developing commercial software understand why early feedback is so important.

Did you do a Beta launch? How did it go, what did you learn, and what was involved?

No, not for v1.0. We do Beta testing with new features now though, and I highly recommend it.

What are the most important lessons, or realisations you've had about life as

a tech entrepreneur?

Firstly, working from home is amazing. If you have kids at home, and/or get distracted, my favorite tip is to listen to instrumental music with headphones. It helps so much. Aside from that, I'd say the biggest thing I've learned is that you have to be in it for the long haul.

Focus on adding as much value as possible, and as long as you align your incentives with the people that are paying you, you'll do great.

Love that tip! I use music to induce a state of focus quite a lot.

I talk about some great tools related to productivity and focus in my latest book *Entrepreneurial Espresso*. You can get a free chapter on productive work cycles and focus music here: <http://bit.ly/free-productivity-chapter>.

Where did you experience the steepest learning curve?

Not prototyping and testing before building.

I figured I could just make judgment calls, but it was so costly. Sketch out your ideas and show them to anyone who will give you honest feedback. Do that for a few rounds and if you're feeling a sense of progress each time, design it in more detail and do it again, then start building. It'll save you 10x as much time as it takes, I promise.

And maybe 10x the money too! One of the biggest rookie mistakes is hiring a developer too soon, based on wireframes and user journeys that are still too sketchy to translate into working software, or spending time building the wrong things... then having to waste more time and money to make adjustments.

What weren't you prepared for, or expecting?

How much time it takes to grow monthly revenue, depending on the business model.

I've had businesses that never turned a profit, others that took years to have their first profitable month, which ended up getting acquired because I stuck with them until they were making a solid monthly profit, and others that were profitable from day one.

Think long and hard about your business model.

If you need cashflow early on, consider keeping your job, taking out a loan,

getting funding, or doing consulting/services to pay the bills so you have time to grow the business.

What have been the highs and lows of your experience as a tech entrepreneur?

The highs are the flexibility, schedule, working from home, the residual income, asset ownership, and mostly the ability to work on something you care deeply about.

The lows are the days when nothing seems to be going well, and you feel like giving up. Read *The Dip*, by Seth Godin and decide if it's time to quit or stick. It'll only take an afternoon to read it, but it'll help you press on when it's worth it, or quit confidently if it's not.

Thanks for the recommendation, I've heard of the book but must confess I haven't read it.

You've just reminded me of an interview I read with Nathan Barry who runs the email marketing SaaS company, ConvertKit, <https://convertkit.com>.

He asked himself:

'Do I still want this as much today as the day I started, and do I still want to be the CEO of a SaaS company?' Because if the answer is no, then I should shut it down and move on.

Then he asks: *'Have I really given ConvertKit every possible chance to succeed?' Because if the answer is yes, then something was wrong. Maybe the timing is wrong, or the product is wrong, or the market is wrong, or I'm the wrong person to do this.*

<https://www.groovehq.com/blog/nathan-barry-interview>.

As another tip before giving up, [Jay Abraham's](#) book, [Getting Everything You Can Out of all You've Got](#) is worth a read. Some approaches are a little old-school, but makes you realise that no matter what you've tried so far, there are literally hundreds of other options for marketing and building your biz. I saw him at a conference a few years ago, and he was brilliant!

What's your top cashflow/money management tip for tech entrepreneurs?

Partner with someone with complementary skills and sign a concise agreement based on profit share. If I had done this sooner, I could have saved \$150,000+ on development for this one app. The crazy part? When I worked with

agencies, the quality of the work was lower than it is with co-founders (not because they're worse developers, because they don't have a vested interest in the business) and it cost way more. This isn't easy, but do your best to build a solid team or partnership because it'll help keep you motivated while saving everyone money. Also, use Stripe to collect payments, <https://stripe.com>.

Yup, lack of skin in the game. It's just not their baby!

Stripe is great and so easy to set up (and as a fintech startup themselves, they are killing it!)

What's a typical day like for you now? Are you a full-timer, or side-hustler?

Full-timer since November 2008 when I graduated.

I wake up at 6:00am, work out, get ready, have breakfast with my family, and work on my top priorities from 8:30am until 12:00pm. Then, we eat lunch together, and I play with my kids for a while before I get back to work until 5:00pm. Sometimes I work at night or on the weekends if it makes sense, but I try to take Friday afternoons off.

That sounds like a pretty awesome routine! I'm jealous! Maybe it's time to develop some new habits. (I know just the app, ha-ha!)



Entrepreneurship allows Kyle to have a more flexible family life

One of our clients said she wished she had a time machine after consulting with us - what would you do differently if you could go back in time and give yourself some advice now you're "older and wiser"?

Great question! It'd definitely be to focus on building one or two things that have long-term potential to become businesses big enough to pay each co-founders' bills. I wasted SO much time working on little apps that never had much potential, but they were almost the same amount of work.

Focus on as few projects as you can, and do your best to make sure each one could meet your goals five years from now (based on business model, market size, problem, expansion, growth, trends, etc.).

That's great advice! What's your number 1 biggest tip / piece of advice to aspiring techpreneurs?

Don't think of your app users or website visitors as numbers in your analytics. Always ask "what's in it for me?" from *their* perspective with everything you design, develop, write, etc. If you do this throughout your entire business, it'll be a lot easier to at least succeed in adding real value for real people, and that's the foundation of every successful business.

Amen to that! Thanks so much for speaking to me! What's next for you and your app?

Absolutely! We're working on sharing progress with family, friends and teams for *Strides*, along with an Android app coming out later this year.

We're also launching a new app called *Summit Day Planner* that covers the Tasks, Calendar Events & Notes side of your daily routine. Lots of people requested these features for Strides, but we decided to put them in their own app to keep Strides from becoming an even bigger app. :)

Uh-huh, the power of public declarations! People are more likely to follow through if they've already openly shared their intentions.

It's powerful stuff – if you haven't told anyone you're going to build an app, tell a few supportive people and "put it out there!"

Good luck with the new app. Exciting times!

Thank you!

Before we wrap up the interview, can we cover a few quick-fire questions - just for fun?

Great! O.k.

Let's do it. Here they come!

- **Agile software development - yes, or no?**
Yes, if managed well.
- **Product presales before launch. Essential or nice to have?**
Presales are nice to have, but feedback on prototypes is essential.
- **Agency dev, freelancer dev, or tech cofounder?**
Tech cofounder, whenever possible. Freelance developer if not.
- **Your favourite wireframing tool?**
InVision. <https://www.invisionapp.com/>
- **The competition - run your own race, or monitor closely?**
Run your own race. Looking over your shoulder only slows you down.
- **Android, iOS, web, or desktop?**
I like to build for iOS first, and be prepared to scale to other platforms.

I've got to ask you more about your last response! Almost everyone we work with wants to know which platform to start with... I'm sure they'd like to hear you weigh in on the topic.

Well, since 2008, the general trend has been toward mobile, and if you're building a software business it's most likely going to need a mobile component, maybe mobile-first or even mobile-only. Running the numbers, there are more people worldwide using Android, but most of the money is spent on iOS, especially when you consider non-game apps, so in my opinion it makes more financial sense to start on iOS, unless you're targeting a specific use case only possible on Android (e.g. Launchers) or your target market tends to use Android more than iOS. If you use something like Firebase, or build your own server on AWS, etc. then you can be prepared to scale to the other mobile platform if things go well enough, and to web/desktop if your users are asking for it.

In my book, *Don't Hire...*, I describe that exact situation as "Cash in the app store, people in the play store" as a very simple reminder - you might not be able to charge up-front so easily on Android, but there are a huge number of users, whilst Apple users are more "conditioned" towards paying for apps up front. Via Android, you might look towards in-app purchases, without charging up-front for the app, or consider other ways to monetise larger volumes of customers, such as advertising - as long as you choose ad types carefully and don't drive your customers crazy with it! (You might also charge a fee to have advertising removed.)

I love that! It's easy to remember and makes sense. Great point about charging too. I've heard that free with ads and/or IAPs (in app purchases) works best on Android. I'm looking forward to testing it out with the Strides Android app.

Where can people find out more about your app?

My portfolio is a great place to start: ConquerApathy.com.

Strides is available online and in the App Store:

Web: <https://www.stridesapp.com/>

iTunes: <https://itunes.apple.com/us/app/strides-habit-tracker/id672401817?mt=8>



CHAPTER 2

“THE ART OF TURNING FAST FEEDBACK INTO A BUSINESS”

Justin Chen is the cofounder of *PickFu*, an app which allows users to gather instant market feedback via polls.

PickFu appears in *Entrepreneurial Espresso*, a compendium of business-boosting tools for modern entrepreneurs. Justin and I first connected when I contacted him about featuring PickFu in the book. In this interview he shares his experiences of techpreneurship.

Welcome Justin!

Could you tell us a little about your background?

I studied Computer Science at UC Berkeley and then held some programming and project management jobs at a startup, and then at HP.

Interesting - having project management skills can really help with managing your development processes! How long have you been an entrepreneur?

My business partner, John, and I have been entrepreneurs since 2006 - we just had our 12 year anniversary in January!

Congratulations, that's a major achievement! Please tell us about your app.

PickFu is a polling service that gets you instant feedback on your ideas and creative options.

For example, if you want input on your latest mobile app design, post a poll with all the app design options and the PickFu audience will vote on which one they like and explain why. A poll with 50 responses can be done in 15 minutes - enabling you to iterate on your design quickly with the confidence of unbiased feedback.

Very useful for entrepreneurs! PickFu allows users to A/B test (in other words, asking: “Do you like this one, or that one best?”), which is so helpful when you want to consult with the wider world, need quick answers, *and* an easy way to gather feedback about the "look and feel" of your app...

Did you have any experience of building apps before you built your product?

When we built the initial version of PickFu, John and I were already running another business called *Menuism*. It's an online restaurant review and menu directory and is still operating today.

Poll Results

Private Nov 9, 2015

Question

Which mobile game would you rather play?

50 Respondents General Population

Export(csv)

Option A



SCORE: 26

13 votes

WINNER

Option B



SCORE: 74

37 votes

A / B testing two different designs using PickFu

So, you're running multiple businesses too! How did you first come to recognise that there was a problem that you could solve with your app?

PickFu came out of our own need for unbiased feedback. When we were working on our first startup, Menuism, we constantly polled our friends for feedback. However, we came to the realization that the responses were inherently biased and that our email harassing was netting a lower response rate as they got sick of giving feedback. That's where the idea for PickFu came from.

Uh-huh. There are only so many times you can ask your nearest and dearest about product names, company names, and designs before fatigue sets in...!

What first made you think - “Yeah! This could be something!”?

Once we built the first version and immediately got value from it, we decided to share it with the [Hacker News](#) community, (run by the startup incubator Y Combinator.) It got a positive response and Gabriel Weinberg, founder of the Internet privacy company, [DuckDuckGo](#), blogged positively about it. After that, we realized that this simple and fast preference testing service filled a need.

Nice. Early publicity is every new founder’s dream! Be prepared to share and promote your product everywhere. You can download a list of places to promote your software here: <http://bit.ly/purposeful-places-to-market-your-app>.

How did you identify the correct target market to suit your product?

Our initial market was the market we were familiar with - other entrepreneurs. However, as word about PickFu spread we noticed that it started gaining traction in a few new target markets. First it was self-publishing authors testing book titles and book covers. Then it was mobile app developers testing their app icons, screenshots and other creatives. After that we started expanding into the e-commerce space with customers using PickFu to fine tune their product offerings, listing photos and marketing copy.

You never know the uses that people will find for your product once you release it into the wild. It might be used in ways you never imagined, which could be even bigger markets than those you first considered, so take careful note of who is using your product and how. Contact customers to say hi, set up short questionnaires to ask people what they are using your app to do, and generally get to know your customer base as thoroughly as possible.

Justin, did you experience a transition to making sure you were marketing your “solution” to the right audience?

We develop a new marketing channel each time we discover a new customer segment. This can be a combination of landing pages, ads, emails and outreach. After a few months, we evaluate the traction of that segment, looking at the ROI (Return on Investment) and [Customer LTV](#) (CLTV, or Customer Lifetime Value). That helps us determine if we’re on the right track with that audience.

That's awesome and something I didn't mention in my earlier comment - the creation of specific marketing to fit the different audiences that you have. The same message won't necessarily appeal to the same groups, which is why creating customer profiles is so important. Understanding the different groups you serve will help you to communicate with and market to each group in the right way.

You can click to download a free [Customer Profile Template](#) that I provide to readers of my book *Develop Your Idea!*

It will help you to create customer profiles, think about the messages you need to communicate, and consider the best places to find your target, or "primary customers" on and offline.

Were you able to get product feedback before launching?

We did not get feedback prior to the MVP, but have constantly improved the service since then through customer feedback. We have also conducted both phone-based and in-person customer interviews to better understand how PickFu fits into workflows.

Did you do a Beta launch?

No, we didn't.

O.k. and now for the \$1,000,000 question: How did you find your developers?

Both of us are developers so we did all the core development. We also have another developer in Argentina that we found through a local firm. We also hire other workers through [UpWork](#), and [bestjobs.ph](#).

Cool, so core development "in-house" plus help from everywhere from South America to the Philippines!

What are the most important lessons, or realisations you've had about life as a tech entrepreneur?

Try not to outsource a job you haven't tried yourself. It's easy to get burned by misplaced expectations and harder to manage someone if you don't have any familiarity with the space. It's also a great learning opportunity to try everything yourself first.

I agree 100%, although it has its ups and downs! Learning on the job can be a source of joy, a complete frustration, or a bit of both(!), but it's an integral

part of really understanding your *entire* business and having as few blind spots as possible.

Where did you experience the steepest learning curve?

When we first started, despite both having software engineering backgrounds, we didn't have much web development experience. Learning a web framework from scratch and getting it deployed to production was quite the learning curve!

I can imagine, and deploying a commercial app is a serious matter! What weren't you prepared for, or expecting?

How entrepreneurship is more of a marathon than a sprint. When we first started, it was lots of long hours and ignoring all aspects of normal life, which was difficult to sustain when success didn't come overnight.

Once we developed more discipline and patience it was much easier to get into a normal, more sustainable pace.

Yup. It can be easy to eat, sleep and breathe the business which is all very exciting, until you get burned out!

Then comes the period of reflection, and making necessary changes to sustain the business, your personal life (and your sanity!) long-term. I think that's a really common learning curve, or maybe it's more of an entrepreneurial rite of passage!

What's your top cashflow/money management tip for tech entrepreneurs?

When your business is doing well enough, apply for a business line of credit at your bank. It will give you peace of mind knowing that you can draw on that buffer if times get tough.

Thanks for sharing that!

What's a typical day like for you now? Are you a full-timer, or side-hustler?

I've been a full-time entrepreneur since 2006.

Currently, I wake up at 6:45 a.m., cook breakfast for the kids and make their lunches. I get them to school by 8:00 a.m. On the way home I'll hit a coffee shop to kick-start my productivity for a couple of hours.

First, I'll triage any customer support emails then switch over to coding, either fixing bugs or tackling a new feature. Once I get back home I'll sync up with my business partner, John, before continuing to tackle the to-do list, which is a mix of marketing, development and delegating to other team members.

In the afternoon, I'll pick up the kids from school and shuttle them around to their activities while squeezing in 45 min work sessions wherever I am. Once the kids are asleep, I'll wrap up any loose ends and double check for customer support issues before winding down for bed.

It's so cool to hear how other people manage their days!

What's your number 1 biggest tip / piece of advice to aspiring techpreneurs?

Have patience and don't get discouraged when things don't happen overnight.

As entrepreneurs we spend all our effort working on something and then launch it, hoping that the world immediately embraces it. However, that gratification rarely comes immediately and sometimes we can second guess our decisions, which might lead to hasty adjustments.

Give your existing and potential customers time to internalize your awesome launch.

Maybe it takes a few days, weeks or months, but have confidence in your decisions and keep moving the business forward.

Great advice, and much appreciated. It can take a while to build momentum, that's for sure!

Before we wrap up the interview, can I ask you a few quick-fire questions?

- **Agile software development - yes or no?**
Yes.
- **Product presales before launch - essential or nice to have?**
Nice to have.
- **Agency dev, freelancer dev, or tech cofounder?**
Tech founders.
- **What's your favourite wireframing tool?**
[Balsamiq](#).
- **The competition - run your own race, or monitor closely?**
Run your own race, but periodically check on the competition.
- **Android, iOS, web, or desktop?**
Web!

Where can people go to find out more about your app? <https://www.pickfu.com>.



CHAPTER 3

CHRISTOPHER GIMMER, "HOW SIMPLIFYING THE CONTENT MARKETING CHALLENGE BECAME A \$40,000+ A MONTH BUSINESS."

Christopher Gimmer is the CEO of Snappa, a web-based graphic design tool for marketers and entrepreneurs.

In this interview, you'll find out how his need to alleviate a problem in an existing business led to the birth of an even more successful one!

We also talk about the reality-check of the 1000-day rule for entrepreneurs, and you'll come across a *lot* of information about strategy, mindset, and the processes involved in scaling a bootstrapped (self-funded) business. Chris really breaks down the rationale behind some of the major decisions that he and his co-founder have made, and the interview morphed into something very much like a case-study.

Welcome Chris. Can you tell us a bit about your background?

It's kind of a long story! I have a finance and accounting background. I majored in finance at university, and worked as a financial analyst for about 5 years. I got bored with what I was doing, and started travelling a bit more, and wanting a bit more freedom. I also wanted to work on things I was more passionate about.

I met Mark, my cofounder at Snappa, at work. I discovered that he did some programming on the side, and started becoming fascinated with the whole online world and online business.

The two of us became really good friends, and we started launching side projects while we were both working our day jobs.

We had a couple of failures along the way like most people, but eventually we had minor success, and then some decent success with Snappa, and then we both quit our jobs to go full time on it. So, that's the quick version!

Was Snappa your first experience of building an app?

The first thing we ever did was a student dating website. We were able to get a decent number of users in our local city, but it wasn't a real business, so we eventually gave up on that.

The first thing we started that was somewhat of a success was [BootstrapBay](#), which was a marketplace for bootstrap themes and templates. (*Bootstrap* is a framework that helps developers to create web based applications.)

We grew that to about \$10,000 a month in revenue, so it was profitable, although there were costs, of course.

After that, we started working on [StockSnap](#), a free stock photo site, and then came Snappa, so that was the progression.

Snappa was the fourth thing that we worked on.

Did you just say StockSnap is one of yours as well? I didn't know that! I use it quite a lot...

Yes, but we recently sold it. We were working on BootstrapBay, and I wrote a blog post on where to get free stock photos. That post started doing extremely well, and was bringing in a lot of traffic. Essentially, we were linking to a lot of these new stock photo sites that were starting to pop up, and we thought to ourselves, "Why don't we create our own photo site?"

At the time, none of these sites had search functionality, and they were releasing photos under Creative Commons, and they usually had just one, or a handful of photographers that were contributing.

So then we launched StockSnap and started building up some traffic...

Actually, we had the idea to build Snappa a year or two before we started working on it.

We weren't sure how we were going to market it, but once we had the traffic from StockSnap we realized that it was probably a good time to launch Snappa as a graphic design tool, so we were running the two sites in parallel for the first two years.

For two years?! Phew! Hard work...

Yes. We were focusing almost all our energy on Snappa, and StockSnap was running in the background, and it became more of a lead generation source. Then someone came along and realized the potential of StockSnap and made us an offer for it. We took the deal because it made sense for someone with

more resources to be able to focus on it...

... and develop it?

Yeah, develop it more than we were doing.

When we launched Snappa, about 30% of our traffic was coming from StockSnap - maybe even more than that, but over the two-year span, we started to develop other traffic sources too. When we sold it, it was a smaller portion of the leads and the revenue that we were generating, so we were okay selling it off.

Yes - I was just going to ask you if you experienced a drop off in web traffic after that.

I had already calculated what that drop off in traffic might be. Obviously, that was a big factor in the selling price - we had to make sure that we made more than enough on the sale to counteract any reduction in traffic

Actually, it was a lot less than I was anticipating, so I think it worked out well for us.

So you've got more time to focus on your baby now?

Yeah, exactly!

How long have you been an entrepreneur in total, Christopher?

I guess if you count the student dating website that we launched back in 2012, then that was the first thing that we ever put out into the world.

For two years it was just messing around with side projects while we were working full-time. There was nothing too serious.

Eventually I said: "I need to figure this out, and learn what the hell we're doing."

At that point; late 2013 / early 2014, I started to read a lot of books and blogs, and listen to a ton of podcasts. I was soaking in as much knowledge as I could about how you market something online, and how you actually launch it.

Early 2014 was when we launched BootstrapBay, and I think at that point, we had a much better idea of different marketing tactics. During that time, Mark grew tremendously as a developer, and the quality of our products increased too. So, 2012 was when I started dabbling, and 2014 was when we started to take things a bit more seriously and really went for it.

We left our jobs shortly after launching Snappa, so I've been an entrepreneur from anywhere between 3 to 6 years, depending on when you start counting!

I recently interviewed Kyle Richie, the CEO and founder of the Strides goal setting app, and Justin Chen, cofounder of the polling app PickFu, and all three of you started in 2012!

That is a total coincidence, so why 2012? Does it take that length of time to develop a high-profile product? There must be something to it...

Actually, one of the theories that I hear quite a bit is the [1000 day rule](#).

It says it will take 1000 days to replace your job income with the income that you're generating from your business. If I take 2014 as the time when we started working on things more seriously, it was pretty true for me.

About 3 years in is when I was making as much as I did in my day job.

It does take time. Nothing really happens overnight.

You do think: "How long do I give this?" and "How long will it take?" each time you start a new venture. It's good that you mentioned that, because sometimes you need to graft for a while - it may not happen in 6 months.

Over the last few years, I've met a lot of entrepreneurs, and there are very, very few people that I've met where it's taken them less than a year to have a resoundingly successful business.

The common trend is usually that it takes a couple of years of grinding to finally get there.

I think with entrepreneurship what you'll find is that the first few years is a lot of sacrifice, a lot of hard work. You'll probably be putting in more hours than in your regular job...

But once you hit that inflection point, it just starts to get a bit easier, you aren't working such crazy hours, and you're making more money than at your day job. You have to be willing to suffer before you can start to reap the benefits. That's the observation that I've made.

Yes, you feel the burn first, and it gets harder before it gets easier!

I think that's why there are so few entrepreneurs, right? Because in reality, most people don't want to make that sacrifice for several years, so it ensures that only the tough survive, so to speak.

Entrepreneurship is a bit Darwinian...

Yes. Exactly!

Please tell us some more about Snappa.

Snappa is an online tool that helps you create online graphics. In essence, it's a much easier and simpler version of Photoshop.

When I was working on BootstrapBay, we were growing it primarily through content marketing.

At that time, I was the one writing all the blog posts and creating all the content. I'm not a designer. I was a finance guy by trade before becoming a marketer/entrepreneur, and any time I needed to create images for our blog, I found it really painful to do so!

When I looked at the different tools out there I found that they either had a lot of good features, but were slow and difficult to use, like the Photoshops of the world, or on the flip side, the tools were easy to use, but too simplistic - you really couldn't do much more than add text on a background.

I found an opportunity for a graphic design tool to cater to marketers and entrepreneurs like myself who wanted to create nice-looking graphics, but where it wasn't in their best interest to be spending hours working on one graphic that was going to disappear in the newsfeed the next day, so that's what the vision for Snappa was.

So, you were scratching your own itch, as the saying goes?

Yeah, that's exactly what happened.

Every time we published a new blog post, as a bare minimum, we would need a new featured image for that post, and I didn't just want to use stock photos, I wanted to make a custom image, and we needed images within our posts too. I was using Photoshop and I just found it was taking way too much time. At the same time, these amazing free stock photo websites were popping up. I thought it would be awesome if we could integrate these nice stock photos within the tool itself to save that extra step of scouring the web for stock photos, before importing them into Photoshop, and adding design elements onto them.

Create a Graphic

Select a preset size or enter a custom graphic dimension to get started.

CUSTOM GRAPHIC SIZE

x

Create

SOCIAL MEDIA POSTS



Facebook Post
1200px x 900px



Facebook Link
1200px x 628px



Twitter Post
1024px x 512px



YouTube Thumbnail
1280px x 720px



Instagram Post
1080px x 1080px



Pinterest Pin
735px x 1102px

Inside Snappa. Creating custom graphics for "the big 5" on social media.

Was there a point where you started to think that Snappa could become something big?

Before we launched Snappa I took a year off from work and for myself, personally, there was a lot riding on it.

If it failed, I was basically going back to my job, which would have been kind of embarrassing, and it wasn't something I wanted to do.

The first week we did an initial promo, and I think we got 250 sign-ups, and that was steadily growing month over month. Within the first few months, we knew that we had something on our hands, and I thought: "Wow, we have a real business here. I can finally quit my job."

You never want to get too far ahead of yourself, thinking your business is going to be the next huge thing, and obviously, we're a bootstrap company, so Snappa is never going to be a billion-dollar business, but it did exceed our expectations.

I think we also had a limited mindset in the beginning. We were saying: "If we can get to \$10K of revenue a month, we're set for life!" Then you hit that and you think, "Oh, okay..." and you put the next goal in place and it's never good enough, you are always striving for more.

But this wasn't just luck – the point to emphasise here is that you validated

your idea before building, didn't you? As a result, you did even better than expected!

How did you identify the right target market to fit the product?

I tried to do as much customer development as I could, because one of the lessons I learned early on from the student dating website and other things that we launched was that it's a shame to waste 3 - 4 months developing something that people don't care enough about.

Yes, it's a tough lesson.

I had a theory that a decent amount of the people that were using StockSnap were probably using those stock photos for social media and content marketing stuff, so the first thing I did was to send out a quick survey asking people what they were using the stock photos for.

If people said they were using them for social media and content marketing, I followed up and asked if they'd mind hopping on a skype call. I think I did another survey too, and then I did about 20 Skype calls.

I asked them questions about their process for creating graphics, and what tools they were using... stuff just to validate whether they were experiencing the same pain points as I was with the graphic creation process. After I started hearing enough feedback from people that it was indeed a pain point, that gave us the confidence to go ahead and start building Snappa.

The launch you did - was that a Beta launch?

In July 2015, we put out an open Beta. It was really barebones, compared to what Snappa does today. There was a lot of stuff that wasn't in that first Beta. One of the things we learned was that you don't want to spend years perfecting a product which: a) might not be useful, or b) where you may not even have worked on the right things.

Our plan was to launch as quickly as possible. As soon as we had something that was semi-valuable we started gathering as much feedback as we could, including identifying other critical features that we needed to put in, and obviously working through as many bugs as possible. After that initial beta period, we learned what the absolutely critical features that we needed were. Then we set a goal and said "Okay, as soon as we finish these three or four features that we've decided on, we'll do a full launch and then we'll have a free plan and a paid plan."

So, we officially launched at the end of November and split out our plans. That was how the launch went down.

It sounds like you were pretty disciplined.

Through all that, what were the most important things that you learned about life as a tech entrepreneur, because I know that wasn't your background initially.

Everything takes longer than you think it will...

Indeed! I don't think new tech entrepreneurs are prepared for that. It can definitely be frustrating...

I don't know a single entrepreneur in the software world that does not share the same experience.

A big lesson that we've learned is to try to validate as early as possible, and to get the product out there because what you think is super important may not necessarily be that important.

You really do learn the most when people are actually using the product.

This may sound counterintuitive, but I've found that features aren't always as important as you think they are. Every time that we've come up with a new feature that we thought was going to be revolutionary, it didn't make as big of a difference as we thought it would.

That's not to say that you should never improve your product, or keep innovating but I think sometimes people think "Oh I just have to add this one feature and then all these customers will come flocking." That's usually not the case, so that's one word of caution - don't always rely on new features to save your business.

That's great advice. Working in development teams myself, I know there's a tendency to have these features that you feel are the "wow!" features. We'd be so proud of those features, and think they were awesome, but you come to realise that customers may be much more interested in something else. It's so important not to waste time and financial resources on the wrong things...

There were some quality features that we launched where we did notice a bit of an uptick, but for the most part, 75% - 80% of the time we launched a new feature, the graph just didn't change that much.

So, what do you think really does start to make the difference?

Is it just a slow, incremental thing? Have you noticed anything in particular

that creates an uptrend?

Believe it or not, I think the reliability of the product is a big thing.

You can have a buggy product that has all the features in the world, but if it's not working properly, eventually people are going to get tired of that.

Usability is another thing - even with a lot of features, if the product is difficult to use, that's going to create a problem.

We tried as much as possible to balance feature development with stabilizing the product; making it as fast as possible, making sure all the bugs were squashed, and making sure it was easy to use, no matter what features were added in.

Of course, marketing also makes a huge difference. At the end of the day, people need to find out about your product. If you have the best product in the world, but no one knows about it, it won't do you any good.

I think it's a combination of getting more eyeballs on your product, and making sure it's easy to use, works well, and listening to your customers in terms of which features are really important, and not worrying too much about the nice to haves.

Thank you. I really appreciate those comments. I say it in my book for tech entrepreneurs, [Don't Hire a Software Developer Until You Read this Book](#) - you can't just invest in features and appearance. The product needs to be stable, free of major bugs (and irritations that drive users nuts!), and perform well (in terms of speed, and time to load screens etc.)

Otherwise, for every new customer you win, you'll lose two or three more.

Steve Krug, the UX and usability expert, wrote a book called [Don't Make Me Think](#), which is a good book to take a look at too.

Software should be easy to use, even with minimal instructions - no head scratching, no frustrations... It should be very obvious how to use it, and its ease of use should be tested with real users!

What would you say has been the steepest learning curve for you?

To be honest, the whole experience was just mental to begin with!

Also, there were two times where we've had to re-do huge chunks of the software in order to make Snappa scalable. Originally, we built the first version of the app on an [Open Source](#) framework, and then we realized it was only going to take us so far, so we had to rewrite some of the code, so that it was completely custom. That set us back quite a bit.

Then six months to a year ago, it was a similar story where we had to convert the app, which was written in [PHP](#) over to [NODE.JS](#), so that was another three months or so of just cranking out code.

At times like that you do feel like you're going backwards because you're not pushing out new features.

Chris, thank you, you've raised some excellent points. The reality is that the architecture for the product is important, and if this isn't quite right, or you need to evolve, or change direction as a business, you may have to revisit work that's already been done. There are times when code needs to be updated, cleaned up and generally improved which can put new feature development on hold.

Chris is sharing some very honest feedback here about some of the day-to-day challenges and frustrations of commercial software development.

There can be a lot of work to do in relation to maintaining and managing code, keeping code quality as high as possible, and making sure that you have a firm foundation to expand from, even if it slows you down for a while, whilst you establish a firm base for yourself.

It's normal to put your foot on the accelerator to just get features built, and then to be forced to ease up as you run ahead of yourself and need to clean house again... This is also known as [technical debt](#).

Yeah, basically you need to do that in order to start pushing out those new features again.

You always want to keep advancing and adding new features, but sometimes you really need to take a step back and improve what you've got, before you can take another two steps forward.

You have to be o.k. with that – it's just part of running a software business.

You need to refactor (revisit and improve) code here and there, and you need to make sure your product is scalable...

I think that was one of the biggest challenges. When we do launch the next project, I think from day 1 we'll pay a little more attention to that kind of stuff - making sure that we have a really good foundation. I don't necessarily regret the way that we did it though, because we had no money.

You have to balance planning ahead with just getting the damn thing out there!

Now that we have more experience, and more resources, it makes sense for us to plan things out a bit more, and to be a bit more careful, but going back two years, we just needed to launch with the frameworks or knowledge that we had at the time.

As someone that's bootstrapped their business, what would be your top cash flow or money management tip for tech entrepreneurs?

Hmmm, that's a good question! The nice thing about the SaaS model and recurring revenue (also known [MRR, monthly recurring revenue](#)) is that it tends to be a lot easier to forecast.

In terms of hiring costs, we always hired just that tad bit ahead, so we weren't putting ourselves in a bad position. We tried to hire as soon as it was possible without screwing ourselves over, but it's tough because you don't want to go too long before hiring because the feature requests pile up, but at the same time, as a bootstrapped company you never want to overextend yourself.

In terms of our expenditure, we spent most of our money on development, and then for marketing, we were extremely scrappy.

We never really did any paid advertising. All the marketing tactics we used were basically free, or as close to free as possible, so you have to figure out what marketing tactics don't require upfront cash and then get really good at that!

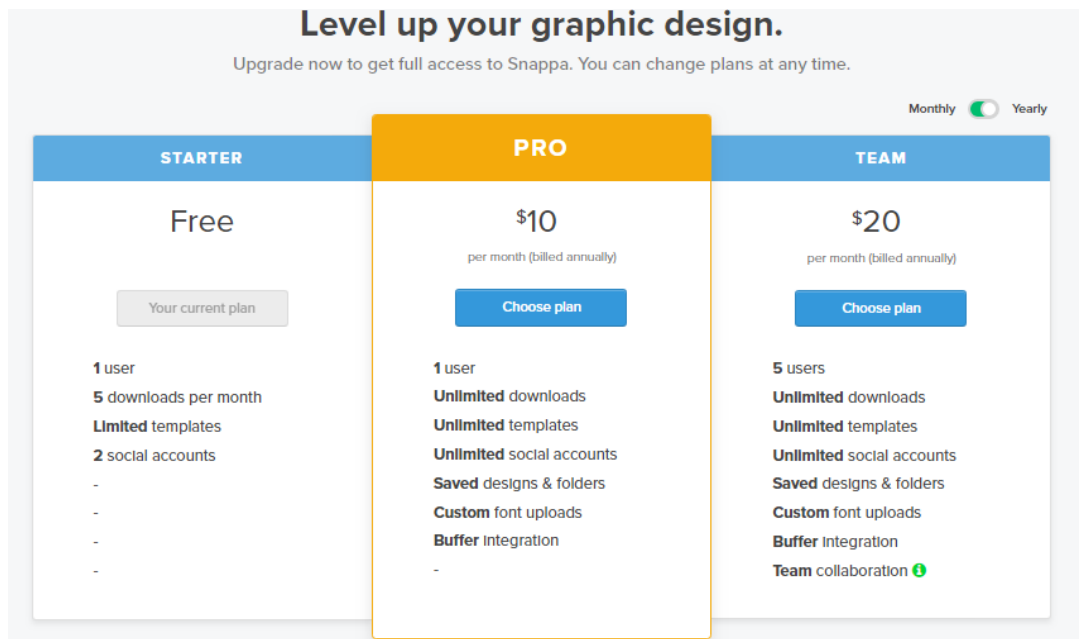
Did you ever do [Pay Per Click, \(PPC\)](#) / Search Engine Marketing (SEM)?

We experimented a year and a bit after Snappa launched.

Unfortunately, because we have a [Freemium](#) product with a very low price point, it's just not very profitable.

I've talked to many software founders about this, and generally the ones where paid advertising is working have products with lifetime values in the thousands of dollars, and are more enterprise-y. With products like ours, it tends to be more difficult to make the ads work.

Ideally, you need a learning budget, and from the people I've talked to, you need about \$5 to 10,000 dollars to really figure out how it's going to work and how profitable it's going to be. That's a bit tough to swallow as a bootstrapped company, to spend \$10,000 on something that may, or may not even work out in the long run.



The Freemium model in action at Snappa.

Uh-huh. That's certainly a lot to bank roll...

I'm currently considering a number of different marketing channels myself. I'm going to try a several new things, and give each channel some time so I can see which ones work...

Yeah, we're still growing month over month so I feel like we still have a lot of room to grow with the marketing channels that we're using.

I'm not ready to make an investment into a channel that didn't look too promising, from our brief experimentation with it.

When you're a small team, I think it's better to do one or two things really well, as opposed to trying ten different marketing channels at the same time. Usually you're worse off doing that.

We've always been of the mindset that having one or two marketing channels that are working, double down on those ones, and don't worry too much about what you're not doing.

That's a good tip! There's a lot of wisdom in the advice to commit to a few

channels, learn as fast as possible, and *make* them work, vs. experimenting more widely and, then doubling down. The latter is likely to be more risky if it requires a large financial commitment, so it's important to manage that risk. Be especially careful if you're considering more expensive experiments...

So, what's a typical day like for you now?

Over the last 6 months to a year, I've been really focused on putting in the necessary procedures to take myself out of the day to day as much as possible.

We recently hired a marketing manager who is now doing most of our marketing, so I've been bringing him up to speed with what we've been doing, what's been working, and giving him autonomy to start looking at different things that we could be doing, or improving on what we're doing now. For me, a typical day includes overseeing operations, trying to come up with new tactics, and new things that our business could be doing, and coordinating the team so that everything runs smoothly.

So, you're becoming a "pure" CEO - more of a visionary, and executing less of the day to day, "doing" stuff yourself. Is that fair to say?

Yeah, that's definitely fair. When we first started, Mark was doing everything development-related and I was doing everything that wasn't!

Now we have support. As a CEO, and a founder that's always what I've been striving for, working on the business...

...[On it, not in it](#), yes!

So, that was my goal for 2017; to get the business to that point where I could take a more high-level approach instead of being in the weeds all day long.

That's the ultimate, but that's also the challenge, isn't it - when you're starting out in business?

You need to be able to switch between different "brains" that handle different aspects of the business; CEO, salesman, worker, customer care, finance person etc. etc. and then to become ready, willing, and able to start delegating so your business can grow.

Were you able to do that early on?

In the beginning, there is just so much coming at you, that you almost don't have time to think high-level!

My goal was to eliminate things one step at a time so I could get to that point.

Support was the first thing that I needed to get off my plate as that really bogs you down.

The next thing was writing content. It was getting to the point where planning all the content, promoting all the content and writing it was becoming too much, so I hired a freelance writer to start helping with that.

Eventually you start taking more of the day-to-day stuff out of it, and then you start realizing the value of thinking more high-level and more strategically.

That's the ultimate goal as founders, to have that flexibility, and spending most of your time being high-level and strategic, and the least amount of time putting out fires, and doing tasks that other people are probably better suited to than you are.

It's scary letting people take over marketing and the blog, because you think that no-one can do as good a job as you, but the reality is that we're not as talented or smart as we think we are.

It's hard to let those things go.

If you haven't read it yet, check out [The E-Myth revisited](#) by Michael E. Gerber. He discusses these concepts in detail, which is helpful in terms of revisiting your vision, and understanding how you should be aiming to manage your business over time so you control it, rather than it controlling you!

Chris, what would be your number 1 biggest piece of advice for aspiring tech entrepreneurs?

I think the number one thing is to try to launch and ship something as soon as possible.

I know people that always seem to have an idea, and always seem to be working on something, and years later they're still in the idea phase, or chipping away at something.

You've really got to ship as quickly as possible because that's where you are going to learn the most - that point when your product is actually in people's hands.

If you're bootstrapping, then revenue is very important, so I would try to validate as much as possible that people are going to pay for your product, so

whether that's getting presales - that's always the best situation, but probably the most difficult.

Just try to be reasonably assured that what you are building is going to generate income when you launch it.

Thank you! So, what's next for you, and for Snappa?

We're always looking at improving the product. We recently launched a team plan, so you can now collaborate on your graphics with different team members.

We always have a full pipeline of feature requests, and things that we want to add in, and for me it's continuing to grow the team and take more of a high-level approach with the business.

Best of luck, with everything! Before we finish the interview, can I ask you some quick-fire questions?

Go for it!

Great!

- **Agile software development, yes or no?**

For us, yes. I think the smaller the company, the more Agile you need to be. We've always had very short timelines and sprints for features and whatnot, so that's typically how we run it.

- **Making presales before launch, essential or nice to have?**

Well, I would be lying if I said it's essential because we didn't do that! Definitely nice to have, but try to do it as much as possible. As long as you have a short time frame for your Beta, I think it's fine. However, if you're building your product for two years without any presales, that's where I think it starts to get scary.

- **That should ring warning bells... So, which is best? Agency developer, freelance developer, or a tech cofounder?**

I didn't have any money for any of the other options, so cofounder! If the software itself is the business, like Snappa where the software is the true value of the company, then I think you really want a cofounder who's been there from day one, and really invests in the product. If the

tech isn't the true value of the business, then I'm more willing to use a freelancer or an agency.

So, the more core the tech is to the business, the more you want to protect it and keep it in-house?

Yeah, exactly.

- **What's your favourite wireframing tool?**

To be honest we don't really use wireframing that much. My cofounder likes to do things inline. If necessary, we'll throw some mockups together in [Photoshop](#). We've never really used [Invision](#), or any of the fancy mockup tools.

- **The competition. Should you run your own race, or monitor them closely?**

That's a really good question. I think it's somewhere in the middle. The last thing you want to do every time the competition launches a feature is to automatically copy that, because you'll always be playing catch-up, and that might not necessarily be the right feature for your audience.

Every competitor has a slightly different customer base, so we always prioritize the feature requests that we get from our customers, along with what our vision is for the product. We keep tabs on what the competition is doing, but I wouldn't say we monitor them very closely, and then panic or anything like that!

- **Android, iOS, or desktop?**

I think it's very dependent on the product itself. With Snappa I have a hard time thinking that you can design functionality for mobile. We take this stance that we always optimize for desktop. Having said that, there are certain tools or software where it's probably best to optimize for mobile, and desktop becomes secondary.

Where can people go to find out more about your app?

You can go to [Snappa.com](#).



CHAPTER 4

MATIC BITENC, "WE BRING FUN TO THE PERSONAL FINANCE APP MARKET!"

Matic Bitenc is the CEO of *Toshl Finance*, a company whose apps are very popular in both the Google Play and App Stores. (The Android app has a staggering 26,000+ reviews in the Google Play Store!)

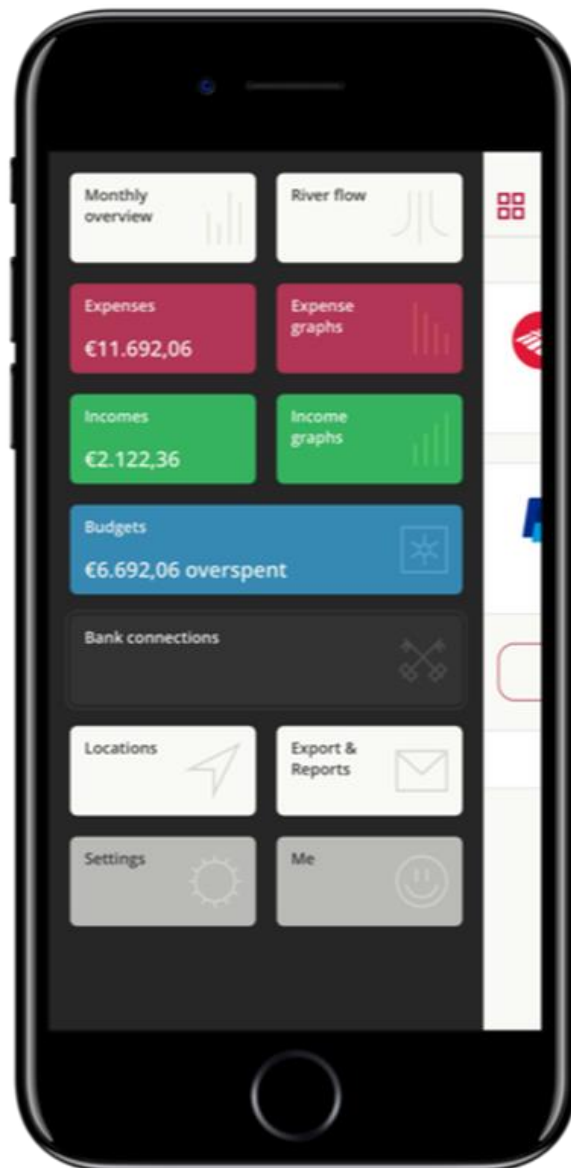
Matic came from an agency background, and he and his team have had what could be described as the dream journey for a tech startup.

They were accepted onto an accelerator programme, moving out to California from Europe, and got early traction with their app.

In this interview we'll talk about healthy cofounder relationships, company mascots, redesign backlash, using social media to promote apps, and more!

Welcome Matic! Please tell us about your app.

Toshl Finance helps people track and plan their finances. People note down their expenses in the app, or sync them automatically with their bank or credit card. They can see their financial flows, set up budgets to limit their spending / increase saving, and get reminded about upcoming bills.



Getting an overview of your finances with the Toshl Finance app

We try to make it as easy as possible and even fun at times. Our Toshl Monster mascots and the slightly odd sense of humour pervasive throughout the apps certainly help with that as well.



The Toshl Monsters

It's great that you mention mascots Matic, it's the first time the topic has come up during this series.

So, what's the deal with mascots?

Tech products can be a bit cold and transactional, so mascots can be used to strengthen your brand, and make it easier for customers to connect with your company. They can be a point of differentiation, and a way to give your brand personality, a topic that I discuss in *Don't Hire a Software Developer Until You Read this Book*.

What was life like before Toshl?

I worked as a user experience architect at 3fs. We worked on many interesting projects before ToshI, but they were mainly for outside clients. It's quite different when it's your product and you're involved at every stage. We get to decide on the direction of the product, also taking on board the feedback from our users, of course!

Before that I studied European Studies in Ljubljana and Lille. Co-founded a web community of Slovenian Mac users and I even did improv and stand up for a while!

ToshI is actually spinoff from 3fs, which designs and develops lots of great digital products. I worked on some of them before starting with ToshI - there was an app for creating comics for tweets, social platforms for telecommunications clients, amongst other projects.

Improv! A world away from the structure of product and software development... The ToshI Team moved out to California from Europe, right? That would be a dream for many entrepreneurs - can you tell us what that experience was like?

We moved to San Francisco in 2012 when we took part in [500 Startups accelerator](#).

It was certainly a very interesting experience, we learnt a lot and had a great time. A friend once said that San Francisco and the Silicon Valley are like Disneyland for entrepreneurs. The density of the startup ecosystem and the opportunities it provides are certainly remarkable.

We moved back to Europe after a while though. The lifestyle and surroundings in Slovenia were preferable to most of us. There's also less and less of a difference between Silicon Valley and the rest of the world when it comes to running startups, and our customers are all around the world anyhow.



The ToshI gang - and some awesome wall art!

What's a typical day like for you now?

We're flexible regarding working hours, so I arrive at work anytime between 7 and 11 a.m., depending on the day, and what we have going on. I check out the work chats and notifications to get a feel of what's going on. I also check the various analytics we have set up.

As we're not a large team, my work can vary a lot. I can be planning future features and business model changes, or replying to support queries, testing, recruiting... whatever comes up. Things are usually more specialised for other members of the team, but entail a variety of platforms and technologies, or design/marketing related work.

How long have you been an entrepreneur?

6 years.

The magic 6 years again! You're the 4th techpreneur in a row that has said

they started in 2012.

It's becoming a bit like that Jim Carrey thriller where all roads lead back to the number 23! The 4 of you have different backgrounds, come from different countries, and came to entrepreneurship in different ways too...

How did you first come to recognise that there was a problem that you could solve with your app?

A colleague was renovating his apartment and precise tracking of finances was crucial.

We talked about possible tools he could use and we wanted to get a better overview of the finances for ourselves. The app market was rather nascent at the time, and all the solutions we found didn't work well, and looked rather crappy and drab.

We thought we could do better, so we set forth designing and making a better expense tracking app! Our first prototype got some traction, feedback was good, we carried on and the rest is history.

You can find out more about the evolution of ToshI Finance here: <https://toshI.com/blog/toshI-finance-press-kit/>.

Press kits and "story telling" are topics that I'd really like to explore.

We've talked about entrepreneurs' origin stories in every interview, but not the actual *concept* of the "Entrepreneur's story." By this I mean the use of story as a marketing and profile-raising device.

Story-telling is in our DNA, and stories are not just for kids! We know from the popularity of TED Talks that adults are also entertained by people able to deliver messages in interesting and engaging ways.

If I ask you to name the global phenomenon that started as an app for students at Harvard University, you'll know exactly which company I'm talking about, because the origin story of the business has been so widely shared.

Take a look at the press kit for ToshI. Not all software businesses have them, but you can gather together:

- Your logo
- Enticing screenshots of your app

- Engaging pictures of yourself, your team, your work environment, product, or other relevant images
- Details about the what, who, and why of your business

It doesn't have to be perfect! You can always update and improve this over time.

Was there a moment that made you think you were onto something big with Toshl?

I don't think there was a single big "Eureka!" moment, but rather a steady stream of responses from people using Toshl who showed us that our product had value for them. Lots of them were very passionate about it, with long lists of ideas for future development. Our approach to building more personal and less commoditised apps also seemed to have struck a chord.

If customers have requests, or even criticisms, these can be a huge source of opportunities, so always log feedback and analyse it with a cool head so you don't miss a trick.

Sometimes what people are trying to communicate is - "If you can *just* fix this, it will make all the difference", or "Once you have a better handle on that feature, it will give me the confidence to upgrade my subscription", so be aware of this.

I think the tech sector is pretty good in this respect, but you do come across companies that seem to see feedback as a drag, and don't appreciate the value of the data they're receiving.

Feedback leaves the door open to understanding more about what your users really care about. You can choose to shut the door, or open it wider and embrace what you learn. This doesn't mean fulfilling *every* request, but you should carefully consider the points that are being made.

Were you able to get product feedback before launching?

With the very first prototype, we did some internal testing with our friends who hadn't yet seen the app. This was to make sure that it was all easily understandable, worked well and so on. The first version was a pretty bare-bones attempt, so more features and refinements quickly followed.

Did you do a Beta launch? How did it go, and what was involved?

A few years later, when we did a big transition to a vastly redesigned Toshl Finance v2, we had a much more extensive Beta program.

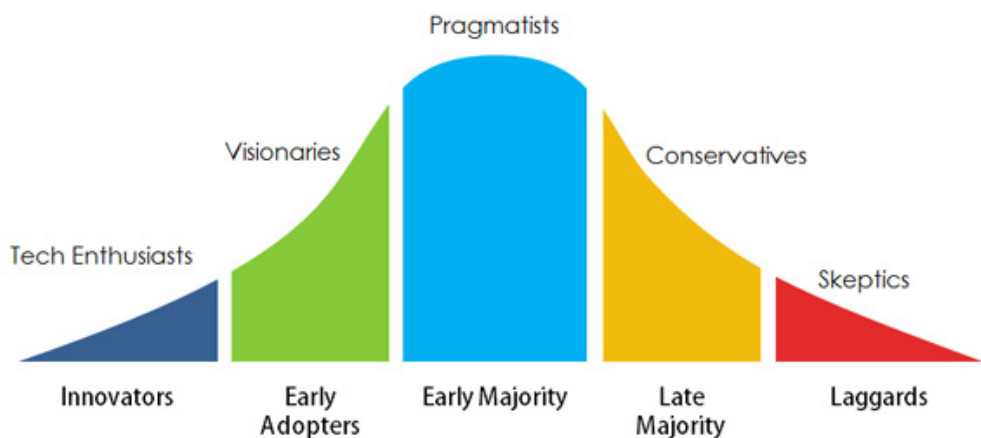
We invited hundreds of our existing users to help us try the apps and work out any remaining issues. Lots was improved and fixed based on that feedback, but we still underestimated how big a shock a new design would be to people.

Most people loved it after getting to know the new Toshl in the coming days, but the shock showed on our app store reviews for quite a while. We learnt to be a lot more gradual with future updates. Beta tests which usually attract the most early-adopting users won't tell you that.

Yes, because early adopters aren't "typical" users... Thanks for bringing that up. It's a really interesting point.

This group thinks differently to the general population, and represent about 13.5% of the gen pop.

Product Adoption Curve



This curve is also known as the Innovation Adoption Curve. Source: <https://www.free-power-point-templates.com/>

Your suggestion to phase in major changes slowly is a good one!

People often hate software changes because they may be forced to change their behaviour, or to relearn how to use something which they were already happy, or familiar with. We become familiar with the apps on our devices, and feel that the software we use belongs to us because it serves our needs,

and holds our data. This is why changes can leave customers feeling **confused**, **inconvenienced**, experiencing a loss of control, or sense of **outrage**!

Snapchat, Twitter, the BBC and other big brands have all experienced what is known as *redesign backlash*. It's a very real consequence of making changes - just Google the term, or the phrase *design backlash*, and you will find *pages* of companies that have faced challenges when changing their user interface, and removing, adding, or altering functionality.

If you want to make changes to your product, try running a preview with existing customers so you can identify any tweaks needed to help customers adjust and accept changes more easily. Updating support documentation, such as FAQs (Frequently Asked Questions), or training videos will also help customers to transition more quickly.

How did you find your developers?

The starting core of the team already worked together at 3fs, so they were the ones who brought us together to begin with. Later on we'd find people mostly through job ads on Facebook developer groups like [this](#), a tech community in Slovenia called [Slo-tech](#), and posts on our website and social media profiles.

You have a co-founder, don't you? Do you have any tips for building happy and productive co-founder relationships?

Yes, Miha Hribar is a co-founder of Toshl and the CTO. I think we get along well because we have compatible characters, and try to maintain a constructive spirit. Obviously, in many years of working together tensions can rise at times, but when this happens we both try to "steady the ball", empathise with the other's point of view and not let the situation spiral out of control. Mutual respect is a prerequisite.

There are 6 of us in the Toshl team right now and I'd say these principles apply to everyone in tight-knit teams. It feels a bit strange theorising about this and offering it as a tip, as this is just basic social conduct as far as I'm concerned. Not that I'm 100% successful in sticking to these tips either, but I certainly try.

What are the most important lessons, or realisations you've had about life as a tech entrepreneur?

There is no ideal path. Carve your own.

Where did you experience the steepest learning curve?

In keeping track of everything that's needed when running a company and making products.

From the app design details, accounting, support, shares, language translations, ongoing testing issues, business deals, promotions... There are thousands of things you need to pay attention to, do and make sure they all come together. Not letting something fall by the wayside while managing to ship high-quality products is a constant battle.

What have been the highs and lows of your experience as a tech entrepreneur?

It's a rollercoaster, so minor highs and lows come weekly if not daily. It's difficult to point out just one. Highs certainly come when you're launching major product updates like the v2 and the Toshl Medici update with bank connections. Getting feedback from customers who love Toshl, hiring great new people, reaching major user and revenue milestones, and getting accepted into 500 Startups have all been highs for us.

The lows are just the opposite - when team members quit, if we release a version with an unexpected serious bug, or when lots of people have problems with a feature.

Let's spend some time talking about marketing...

How did you identify the right target market for your product?

Our initial target market is rather broad, as managing personal finances is something that almost every adult person needs.

We narrowed down the target segments using our existing experience with our customers. For example: obviously tracking finances using mobile apps would appeal more to younger and mid generations (20-45) who are old enough to handle their own finances, yet more at ease with technology than older people. We used anonymous statistics and data from social networks to confirm and narrow down the results.

Further segmentation was based on qualitative research from our support experience.

We were able to identify a few main types of users who used Toshl in a certain way and came to represent a certain market segment.

For example:

- People working outside their home country who use Toshl for currency support and its ability handle accounts in multiple countries
- People who want to lower their spending and get deep into budgeting details
- People who need to file expense reports, and so forth.

We then apply these lessons to ad variations, and apply the demographic targeting in some cases for better efficiency.

Thanks for these insights! That first segment is one I would never have considered when thinking about who would use a finance app.

I think it's worth pointing out that with a new business, you won't always know exactly who's going to use your app, and how, and you may be surprised to discover the subgroups that are using it! I've spoken in several of my books about being fully present when doing customer support, and paying close attention to the types of people that are making contact with your business, the demographic that they come from, and how (and why) they use your app.

Was there a transition to making sure you were marketing your "solution" to the right audience?

I don't think there's ever a perfect fit. We're always learning and transitioning towards better segmentation, content, and new marketing channels, which all bring new challenges.

Segmentation is helpful for thinking about marketing, making it more efficient, and finding new ad content, but marketing directly to a segment is just one tiny dimension of your product. It's your initial "hook" that draws people's interest, when a problem or desire arises. From that point on, marketing is really ingrained into every design decision you make for the product.

They're values that you subtly communicate to customers and they draw people in to using Toshl in different ways to manage their financial lives.

What's your preferred social media channel, and why? I'd love to hear your opinions about making social media work for apps, and SaaS products.

Facebook. Simply because it seems to garner the most response from our users.

Posts are structured to allow debate to develop, and it seems to work well. On the downside, there's the heavy hand of Facebook when it comes to limiting or increasing your post reach based on customers' business interests, and so forth. It's a nice additional communication channel on a platform that people are familiar with, but I'd never rely on FB alone to reach our customers. Emails are still a lot more reliable and less encumbered by gatekeepers.

That brings us neatly to the old "Which is best - social media, or email?" debate!

A social media platform does not offer any true ownership of the profile that you build up. It can change its rules, close down, or change its focus, which can leave businesses in trouble if they are overreliant on social channels. People check email regularly, and addresses don't tend to change frequently, so unless customers opt out of receiving communications from you, email is still a reliable way to stay in contact with prospective and actual customers...

Personally, I love Twitter and the publicness and searchability of it, but the reach is lower and it's often difficult to follow a thread.

Social media is great for communicating with your most engaged customers who want more tips and to know what's going on with the company. We post all the stuff we like to share; e.g. new updates, upcoming Beta tests, personal finance tips, but consider too insignificant to bother everyone with using an email blast, which might quickly become annoying - and takes more work.

Great point, and an interesting example of how to use social media as a way of sharing useful snippets of information!

How much time do you allocate to marketing on a weekly, or monthly basis?

About a day each week, but the time is unevenly spread.

Which activities do you think have helped your startup to gain the most traction?

Talking, and writing to journalists (especially in the beginning). However, it's getting more and more difficult as we're over the "app hype" of a few years ago.

Also, app store optimisation, ASO (a form of SEO for the app stores to help your product to be discovered through the smart selection of keywords, and keyword rich descriptions) and optimising paid marketing campaigns ([AdWords](#), [Apple Search Ads](#) etc.)

One of our clients said they wished they had a time machine after getting some advice from us. What would be the number 1 marketing tip that you would give to yourself, if you could go back in time and coach your less experienced self?

Start with paid marketing earlier, and double down on getting the analytics right.

What's your top cashflow/money management tip for tech entrepreneurs?

Use Toshl ;)

Toshl Finance is mentioned in two of my books as a useful tool for entrepreneurs / tech entrepreneurs in terms of:

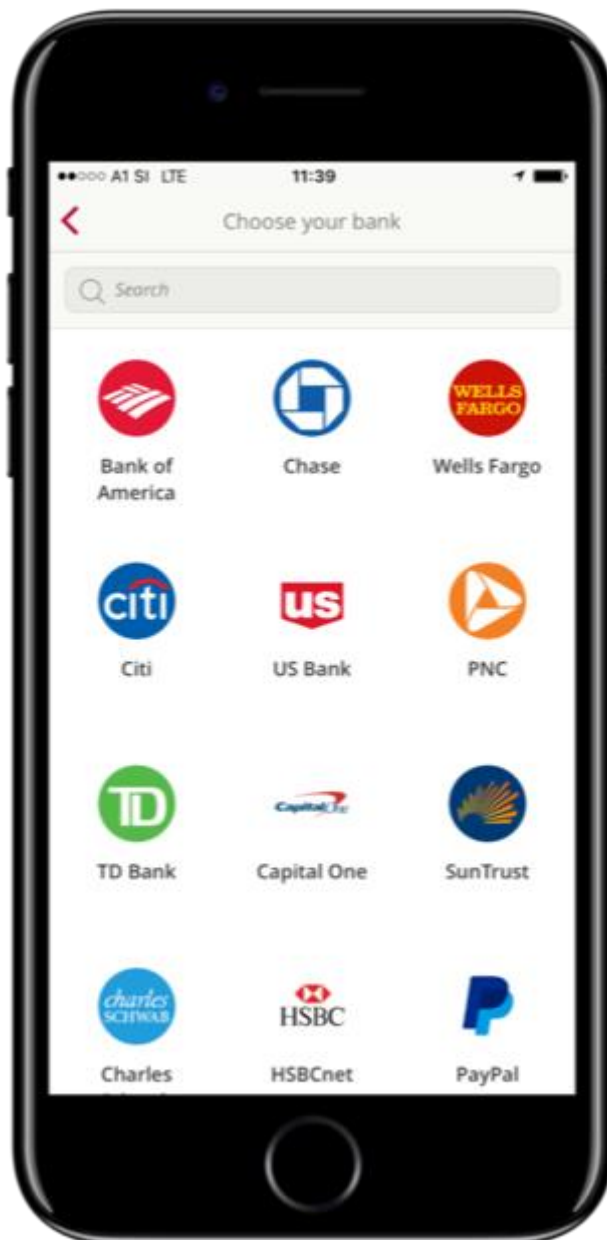
- i) creating an initial budget for building an app, and
- ii) maintaining an ongoing monthly budget to keep the product running and to monitor [burn rate](#).

You can find tutorials on how to use Toshl Finance here:

<https://toshl.com/blog/tutorials-manuals/>.

What's next for you, and your app?

Going deeper. We added over 9000 bank connections with US banks and services in 2017, and will be adding lots more connections worldwide in 2018. We'll make it even easier to help people stay on top of their finances - first by tracking financial flows, regardless of bank, service, or currency, and then by managing the money directly. All the while making it more fun and effortless to do so.



Just some of the many bank connections accessible via Toshl Finance, displayed on an iPhone v7

Impressive. That's a LOT of bank connections! I wish you well with your plans. Before we wrap up the interview, can I ask you a few quick-fire questions?

- **Agile software development - yes or no?**

Yes, in principle, but we use a slightly modified approach ourselves.

- **Making product presales before launch - essential or nice to have?**

Depends on the product. Mostly nice to have.

- **What's your favourite wireframing tool?**

[OmniGraffle](#). I also use [Sketch](#), but still prefer the responsiveness of OmniGraffle for the quick stuff.

- **The competition - should you run your own race, or monitor them closely?**

Run your own race. You should know the competition, but certainly not obsess. Especially in a field as saturated with competition as personal finance apps.

- **The best app platform - Android, iOS, web, or desktop?**

It's difficult to choose between Android and iOS.

Android has a better developer console, but I still find app discovery to be better on iOS. Less devices and OS variations help too.

They go neck and neck.

If I were making a new app and had to choose one of the platforms to start with, I'd probably go with iOS, but it depends on the product and market.

People are always interested to know the answer to that, and I really like that you brought some points to the discussion that haven't been mentioned before.

It's been great Matic, thanks! Where can people go to find out more about ToshI?



You can find us here:

Website: <https://toshl.com>

Blog: <https://toshl.com/blog/>

Tutorials: <https://toshl.com/blog/tutorials-manuals/>

CHAPTER 5

ALEXIS THERIAULT, "ACHIEVING 500,000 APP DOWNLOADS & 10,000 DAILY USERS WITH A YOUNG FAMILY, AND A FULL-TIME JOB!"

This interview features Alexis Theriault, the founder of the *Brain Focus* productivity app.

We'll be chatting about his experience of hitting **500,000 app downloads and 10,000 daily users** - all generated from his side-hustle; an app development business.

Welcome Alexis!



Alexis Theriault, founder of the Brain Focus and Brain Focus Time Tracker apps

How long have you been an entrepreneur?

I studied software engineering, and now work as a software developer.

I started working on my own apps about 3 years ago - mostly to learn a new technology, but then saw the potential and started trying to earn some money!

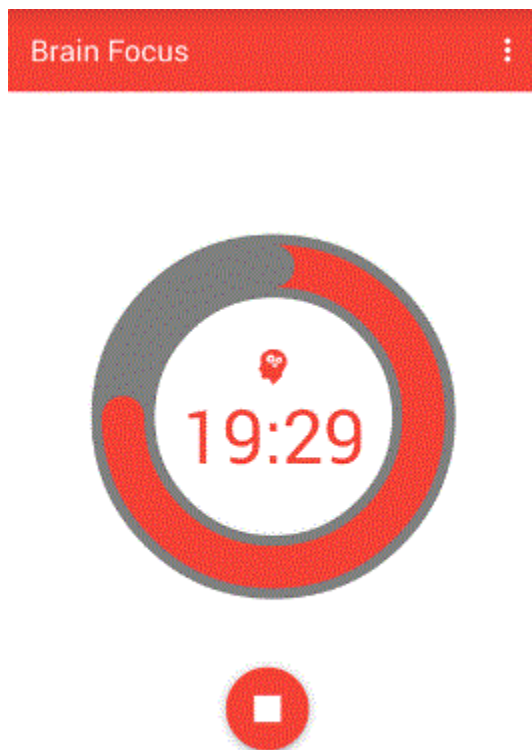
Did you have any experience of building apps before you built Brain Focus?

Not too much. At work we had started building mobile applications. The first thing I did there was application maintenance, and then we decided to rewrite an application using new tech. That was when I started working on *Brain Focus* to learn about all aspects of mobile development.

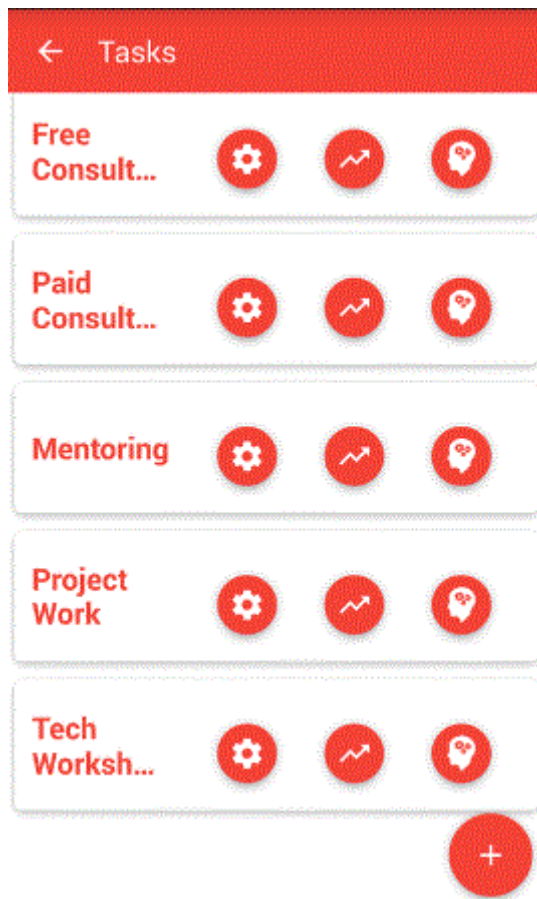
What else can you tell us about your app?

Brain Focus is a mobile application based on the premise that your brain needs a break in order to be more productive.

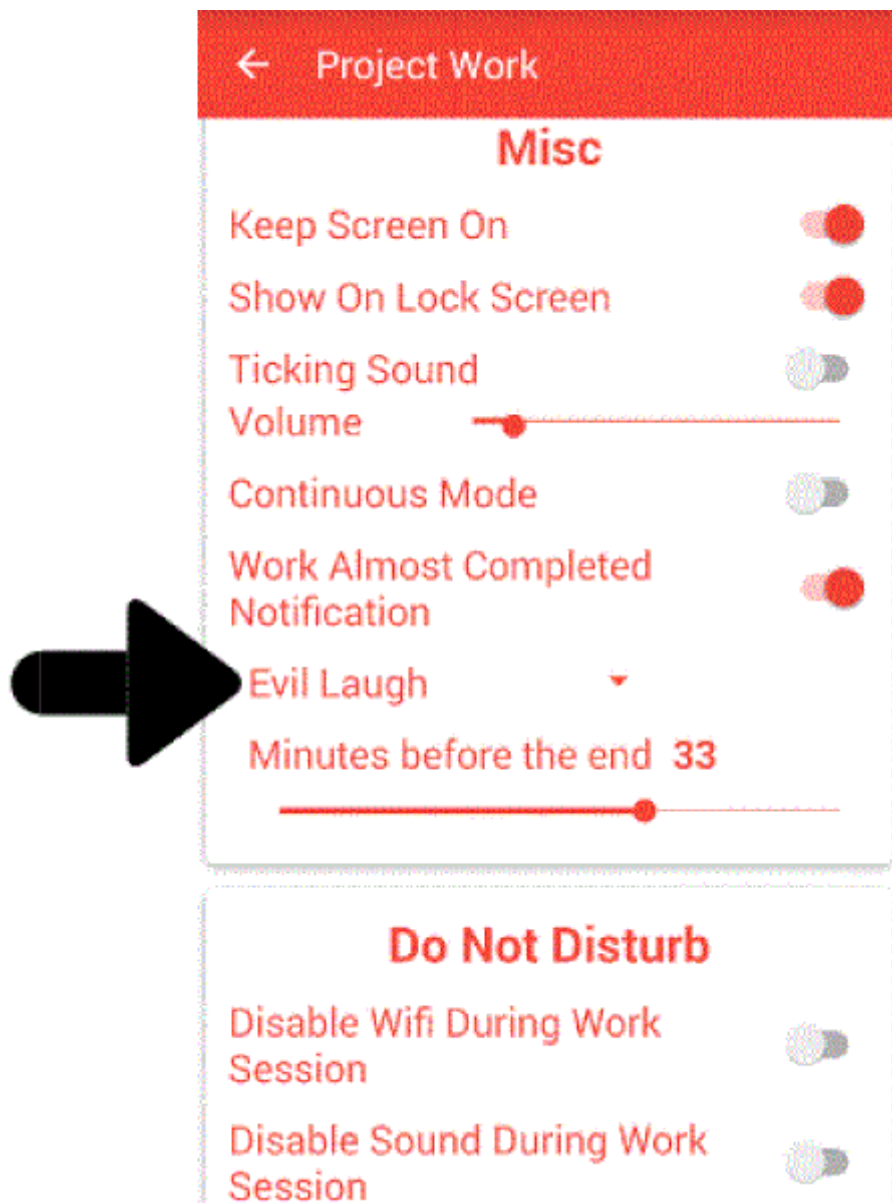
It can be used to achieve techniques like the Pomodoro, or the [52-17](#) (52 minutes of work, with a 17 minute break).



Start the timer, and the Brain Focus app will count down to zero



Add your activities to the app, set time limits for each task, and choose an alarm sound.



Come on, it has to be the Evil Laugh, right?

I've tried several cycles, including the 50-10, but never the 52-17! When I first left permanent employment to work as a freelance software delivery consultant, some of the developers I worked with used [Pomodoro timers](#) to manage their time when working on product features and user stories. That was my first introduction to the [Pomodoro technique](#), a

technique to enhance productivity and concentration, by working on tasks in short, intense cycles.

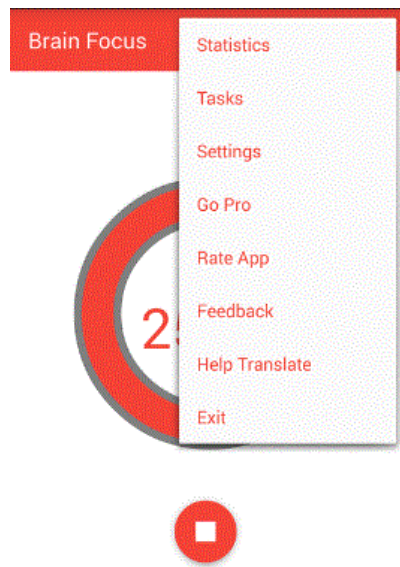
There are many productivity cycles out there - it's about finding the rhythm that gets you the best results.

If you're interested in exploring the benefits of working this way, here's a free chapter on productivity and focus, taken from my book of tools and software for small businesses, *Entrepreneurial Espresso*: <http://bit.ly/free-productivity-chapter>.

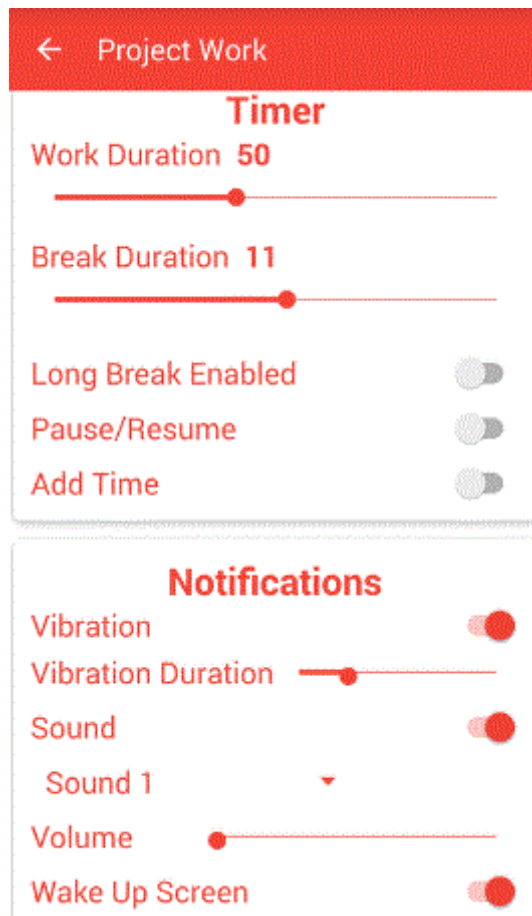
Brain Focus started as a single app, which is the productivity timer, but then I created another application which is called [Brain Focus Time Tracker](#), which tracks time in a simple way. You create an item in the app, start tracking it, and stop the tracker when you're done. Then you can look at your statistics to better understand where you spend your time.

When I can't decide between similar apps, I usually download 2 or 3, keep the one that's easiest to get started with, and delete the others. When I was looking for productivity timers a few years ago, yours won!

I like the app because it has clean, simple user interface and design, it's easy to use, and there are some nice options available via the Settings menu. It's the perfect example of "just enough" functionality arranged logically, and without going overboard.



Once inside the Settings menu, there are a list of options



Choosing your preferred settings

There are a long list of options in the Settings area, but they are clearly labelled, and can be easily accessed by scrolling up and down the screen. Work, and break durations can be chosen, and the app can be set to vibrate, or play a sound when your time is up!

How did you first come to recognise that there was a problem that you could solve with Brain Focus?

When I started building the app, there were already a lot of similar applications in the App Store. I thought: "I'll do this for fun, and we'll see what happens." Then I started to get some downloads, then more and more followed, along with some good reviews.

I started to get hundreds of users per day and began rising in the app store

listings. At that point I started to think that I had something. Based on the good feedback I had received, I began to think that I could earn money from the app, which would help in investing more time into it.

Were you able to get product feedback before launching, Alexis?

Not before launching, but I started to receive feedback from users post-launch, and started implementing the features that people requested. That really helped me!

I did do a small Beta launch with my co-workers...

What are the most important lessons, or realisations you've had about life as a tech entrepreneur?

Building software is costly (in terms of my time) and people are now used to getting software for free, so it can be challenging to monetise.

If you're interested in Alexis's business model, he has opted not to charge upfront for his apps, but offers a *Go Pro* upgrade option which works like an in-app purchase. Users that wish to move to the *Pro* plan can choose what they want to donate (known as PWYW - Pay What You Want, or Pay What You Wish pricing) by selecting from five set price points. In previous Techpreneur Interviews, (please refer to the interview with Kyle Richey) we've talked about Apple's App Store users being more "primed" to pay for apps than Google Play Store users, but this is the first PWYW model that we've covered on the blog.

It can be nerve-wracking when you first start charging customers to use your services - especially when customers have easy access to free apps. PWYW empowers the customer, and can be used to gather data about how many users choose to pay, and in this case, to monitor which price points are most (and least popular). Should Alexis choose to change his business model in future, he will have historical pricing data that he can refer to.

What else weren't you prepared for, or expecting?

The Android software versions all have different behaviour. There are variations between different phone manufacturers too, so there are often bugs on one phone, but not on others.

This makes it hard to reproduce and fix problems, and I needed to buy a lot of phones!

It's never the first thing techpreneurs think of when running an app business, but when creating apps, you'll need to be prepared to do testing on different devices for the reasons that Alexis has mentioned - devices aren't the same, and they behave differently. Unfortunately, you can't rely on your app performing in the same way on different devices - even different models made by the *same* manufacturer of a tablet, or smartphone.

You can test manually, but you can also use app testing services, such as [Amazon's AWS Device Farm](#), which give you 1000 minutes of free testing, and remote access to a range of *real* devices of different makes and models - all managed via the Cloud.

It depends on your product, but in my case, it's hard to test functionality related to measuring time in the Cloud, so I use physical devices when I test.



Desktop and mobile devices - Source: Brad Frost.

https://www.flickr.com/photos/brad_frost/7387824246,

Let's talk Android vs. iOS, web apps, and desktop apps. Do you have a preference?

Android, since I feel it's an easier, less costly platform. iOS second, since most people prefer to use their phones. Then web. I think desktop use is declining,

but [progressive web apps](#) could change everything.

What have been the biggest highs and lows of your experience as a tech entrepreneur?

Seeing increases in downloads and usage is my biggest high, such as when I reached 500,000 downloads, or 10,000 daily users. My lows come if I introduce bugs into new app releases.

What's your top cashflow/money management tip for tech entrepreneurs?

My best advice is to keep your day job, so that you don't expose yourself to too much risk. That is a choice, but it can be better to start whilst employed, and when you think it's a good time to invest all your time on your project, then you can leave.

What's a typical day like for you now?

For now, it's a full day's work, then life with kids!

What would you do differently if you could go back in time and give yourself some advice now you're "older and wiser"?

Start when you're young!

I would have started working on side projects earlier, when I had no responsibilities (no house, no child, no girlfriend) because the more responsibility you have, the less time you have to work on projects. If you have less responsibilities, it's easier to quit your job, and to focus.

Thanks for the advice Alexis! What's next for you and Brain Focus?

I'm hoping to have more time to invest in Brain Focus, so that I can improve the Android version, and build an iOS version with the same features, and more!

Where can people go to find out more about your app?



Brain Focus

Android / Google

Play: https://play.google.com/store/apps/details?id=com.AT.PomodoroTimer&hl=en_GB

iOS / App Store: <https://itunes.apple.com/us/app/brain-focus-productivity-timer/id1262657470?mt=>



Brain Focus Time Tracker

Android / Google

Play: <https://play.google.com/store/apps/details?id=com.AT.TimeTracker>.

CHAPTER 6

NATHAN KONTNY, CEO OF HIGHRISE: DECONSTRUCTING HIGHRISE (AND WHY “EATING YOUR OWN DOGFOOD” IS GOOD FOR BUSINESS)

Nathan Kontny is an entrepreneur that has founded several businesses, including City Posh and Inkling Inc. Several years back he was brought in to run Highrise, a startup SaaS company whose core offering is a “simple CRM” system for entrepreneurs.

We cover a lot of ground in this interview, including the intricacies of running customer interview sessions, strategic marketing, hiring, and hustling in general! We will also “deconstruct” Highrise, and look at how an established SaaS company literally “takes care of business,” as explained through the eyes of its CEO.

Welcome Nathan!

First, could you tell us about Highrise and how it came to be? My understanding is that it’s a spin-off from another company...

Highrise was originally launched in 2007 by the makers of BaseCamp. They were known as 37 Signals back then.

They were having trouble keeping up with talking with reporters, and lawyers, and dealing with landlords... There were all sorts of collaborations that needed to happen. Because it was people based, rather than project and task based, it didn’t make sense to use the Basecamp project management software, so they created a simple CRM to do the job. It ran for years, but it was never the focus – that was on BaseCamp.

The product hadn’t had any updates for a while, but was growing as a business, and it deserved more attention.

It became a spin-off in 2014, which is when I came in to run it. Highrise is now its own company, and there are 7 of us in the team. We help people who need a simple CRM, and need to track who said what to whom, and when - whether it’s sales leads, speaking to journalists, or other tasks; it’s about making sure those things don’t fall through the cracks.

In previous interviews, we’ve talked about how people got started, but I’d

love to talk to you about the *middle* part of the story - about establishing the product, marketing, sales, optimisation, and fine-tuning...

Just from looking at your website, it seems that you know your user base *really* well. There are a lot of references to *how* your customers work in your sales copy, with some really specific language - for example, when you talk about customers' "lead spreadsheets." How did you gather such intimate knowledge of how your customers think and feel?

There are a couple of things – talking to them, and using the product so much ourselves.

None of the Highrise employees came from BaseCamp. We didn't have that knowledge of who the core customers were, and who was using it.

So right away, we made sure that we used the product every day. We started using it for our internal helpdesk, and used it to manage all our incoming emails, and for managing support requests, feature requests, and customer requests for pricing and demos. We converted that *all* over to Highrise.

Just the act of using the product every day to support ourselves gave us a lot of knowledge of the product, how people use it, its quirks, and its problems.

I come from an Agile background, and when you consume the service that you are offering to customers, we call that "**eating your own dogfood**" – because if it's good enough to give, or sell to others, it's good enough for you to use as well, wherever possible! This removes those blind spots you can have in relation to your product.

When you use it yourself, you can empathise better with your customers, and get eyeball-to-eyeball with the things that don't work so well on a practical level, because you're a customer too.

How did you approach speaking to customers?

It's quite hyped-up parlance now, but we ran a number of *Jobs to be Done* (JTBD) interviews.

JTBD looks at how people identify that they need to solve a problem, or transform in some way – in other words they recognise that there's a "Job to be Done." A person then "hires" a product, that has a "Job to Do", to get them from where they are, to where they want to be.

Jobs to be Done was made famous by Clayton Christensen, a Harvard professor and leading thinker on disruptive innovation. He's the author of the [Innovator's Dilemma](#), and the [Innovator's Solution](#) books.

Clayton did some research for McDonald's because they wanted to increase

milkshake sales.

When they started asking people *why* they were buying them, people were saying: “I have this long commute to work, and if I “hire” a banana, I eat it too fast, and if I “hire” a muffin, the crumbs are all over me, and if I “hire” a bagel I have to mess around with the cream cheese, and if I “hire” a donut, one is never enough... but when I buy a milkshake, it lasts a long time. It supports me on my drive to work, and I’m still full at 10.00 a.m.

(You can find an in-depth Medium article on the topic [here](#), and some [scripts and JTBD questions](#), written by a product manager from Google. You’ll also find an article about understanding your customers on the [Kissmetrics Blog](#) (a blog well worth following for its quality content on a range of business topics.)

If you’d like to learn more about the research done for McDonald’s, you can find an article published in the Harvard Business Review about it, and the theory of innovation [here](#).)

How did Highrise manage the JTBD process?

We borrowed Ryan Singer (Head of Strategy) from BaseCamp, as he’s well versed in carrying out Jobs to be Done interviews.

Then we got customers on the phone, and basically interrogated them! JTBD interviews aren’t always a comfortable experience... We asked them about their businesses, and their emotions, and what they were going through when they bought Highrise, so the information you see on our website came from those interviews – lead spreadsheets, follow-ups, things not falling through the cracks – in fact we modified the language on the website after we ran those interviews.

Customer interviews can be tricky. It’s easy to infer the wrong things from interviews, and customers can say one thing, but actually their motivations can run a lot deeper. How did you make sure you pulled out the right information from the interviews?

Ryan knows Bob Moesa, who worked with Clayton Christensen, and educated himself in this area, but it’s definitely a skill you need to practice and get good at. I’ve been running my own businesses since 2005, so I’m accustomed to talking to customers about products, but maybe not getting the feedback I need right away.

Customers love to talk about features. If you ask most customers what they want, most times they’ll tell you about a feature they dreamed up. This

happened to me on Twitter the other day, when I was talking to a customer about a problem they were having. I had to say: “Just put Highrise out of your mind and tell me about the problem you’re trying to solve.”

You must help the customer to distance themselves from the product temporarily, and to focus on the job they have, and the emotions they go through.

You’re not paying customers to be innovators for you. It’s not the customer’s job to provide you with all the information you need to make good judgements about what you’re going to do. You have to get really good at teasing that information from them.

You have to ask “Why?” many, many, many times until you think you’ve got all the layers – starting from the feature request, down to what’s really going on within their business that’s troubling them, and driving the need to ask for the feature.

Here are some YouTube videos about our [Jobs to be Done interviews](#).

Thanks, that’s a great piece of advice. It’s important to be able to separate the product from the problem!

Don’t just take a feature request at face value, follow up with the customer, because there could be more to the request than you realise. The process shouldn’t always be: “He, she, or they said they want feature A, so we’ll build feature A” without further discourse, or analysis... It could be a great idea, but you might be missing an opportunity for learning and gaining deeper insights about your customers, product(s), and pricing, so probe a bit more before going ahead.

Toyota do this really well, they say: “Ask why 5 times...”

I started thinking about Toyota as soon as you mentioned asking “Why?” many times!

(If you haven’t come across it before, The 5 Whys exercise was invented by Sakichi Toyoda, the founder of Toyota Industries. I refer to an article about the 5 Why’s in my book *Don’t Buy Software for your Small Business Until You Read this Book*. Here’s the link to the article: [Toyota Traditions. Ask 'why' five times about every matter.](#))

It's important to set your customers up for the JTBD interviews.

You need to let them know that you’re going to be drilling down, otherwise it feels impolite; “No, but *why* are you...? But *why*...? Please tell me *why*...!” It can get uncomfortable when you’re trying to investigate the psychology of people.

When you ask customers a lot of questions, you turn the spotlight on them, and people often want to focus on what *they* want to focus on, and may not go into real depth with you. From the perspective of someone that's worked on a lot of product teams, I'd say that people often request features based on the first idea that comes to them that seems like the answer.

That's why psychologists are trained to get deep into people's psyches, and to understand their motivations. As people who make products, we need to channel some of that.

A product team could take many days (or longer) to consider a feature and its pros and cons, and then to plan it out, and work through all the kinks in the customer journey / steps in the process.

They will also consider the right technical approach, and the best way(s) to deliver the functionality and present it on screen etc. I think it can be useful to educate customers about how much work and thought goes into creating quality features, and why we need such detailed information...

I also noticed on your site that you tick all the best practice boxes with regards to marketing - you've clearly defined your customers' problems, your product's benefits, and you provide lots of social proof - quotes, tweets etc. Could you talk us through the work involved in getting your Homepage to that stage, and what went into bringing all those elements together?

The JTBD interviews provided a lot of it. People talked about searching for "something simple". Even the top phrase on the page: "Simple CRM." *Everybody* was looking for simple. People also kept talking about "zero learning curve."

We talked to all these entrepreneurs that were super busy, and were hiring their first sales person, or business development person, or support person that they needed to collaborate with. They didn't have time to read anything, they just wanted something they could turn on, that would work really fast.

Salesforce, I don't think you would expect to just turn on. If you work at Accenture, or one of those big consulting companies, they have "Salesforce Champions" - people with a dedicated responsibility to assist users.

We know from our interviews that our customers don't have champions. They just need to get out of their spreadsheets, today – right now!

So all that helped with the language. Our marketing covers versions of that

message.

The wording for: “We have a manual, you won’t need it” came from thinking about *other* products that we all really appreciate for just turning on and working, like an iPhone. People say they love iPhones because they’re so simple, and because they didn’t have to read a manual. It’s just intuitive. As you say, there’s a ton of social proof, I’ve been making products for a long time, and I’ve seen over, and over again how important it is to have social proof, whether it’s logos, or case studies.

It varies – for smaller businesses you need a lot of quotes, maybe tweets. If you’re a small SaaS business, and you’re dealing with enterprise businesses, they’ll want to see case studies, or how other businesses used your product and saved money, or how other businesses have implemented your product.

It’s all different versions of the same thing; they want to know; *do other people like using you?*



Social proof via Twitter...

We also looked at other ways to provide social proof, from magazines like [Inc magazine](#), and [Entrepreneur magazine](#) - publications that I *know* my customers read. I’m very attuned to that.

The JTBD interviews really helped guide us to highlight the right benefits, and to answer the question: “Of all the emails we receive, and the things people are saying about us, which ones are we going to spend time highlighting on our homepage?”

Life's too short for cumbersome CRM systems. We designed ours so you'll be a master within minutes.

"Master within minutes" - a powerful sound bite which appeals to Highrise's target audience

Thank you. How long has it taken you to “optimise” your homepage? Would you say your homepage *is* optimised?

We’ve been optimising it forever! BaseCamp optimised it a long time ago, then we came in... I can’t even tell you the number of times I’ve blogged that we just got another 31% improvement on our Homepage, so it’s never done!

I just finished an experiment 2 weeks ago, where I added a link: “What is CRM?” in the footer on the site, it’s a popular search term, so it was an attempt to do some more SEO work.

That's a great example of how tweaks and changes can improve a website, make it more targeted, capture more leads, and convert more sales. If you're doing this, have your website analytics in place first so you can compare before vs. after!

Are there any other marketing tactics that techpreneurs can use when putting together a high converting website?

You’ve got to get the layout right, the social proof... I’ve been doing web design reviews every week on YouTube, where I look at someone else’s site and I feel that people are getting testimonials wrong.

Either they don’t have any at all, or they’re buried somewhere at the bottom of the page. I think you need them high up to convince people to stick around and not [bounce](#) right away.

Some of the arguments I get for people not having testimonials are:

- They’re new
- They’re startups
- They don’t have enough customers yet
- They just launched

But there are ways to hack around that.

Get the product in the hands of friends and people you know, and you’re likely

to hear something great. At first it was my sister, or my mom commenting on early sites that I worked on. There's nothing wrong with putting testimonials from your sister, or your mom on your website. If they said it, and it's true, who cares?!

You don't have to say: "This is my mom", although if you do it could be interesting! You can say: "Here's what she said, [and use your mom's name] she loved this product!" I didn't pay her to say those words, she wasn't lying.

Another thing - go to the biggest customer that you can find, and ask for an introduction. Offer your product, and give yourself away for free. We used to do this at the first company I started with Y Combinator, and we gave our product and ourselves away for free to O'Reilly Media.

We made ourselves available, and went to their offices and showed them how to use the product. It was free consulting, but at the end of the day I got to use their logo on our site, and mention them in interviews, and use cases, and they were talking about it too and about how well the product worked...

We didn't make a dime from that deal, but the next one we could charge for, and it generated a good buzz.

They are good tips! Going back to testimonials... User testing is a great way to get quotes and testimonials too - usually someone says something which is quotable!

We've used sites like [UserTesting.com](https://www.usertesting.com) before. You pay a price, \$20 - \$30, and the tester uses your product, and they record a video. Whether it's the first, or second iteration of your product, someone will make a positive comment about what you're doing.

Keep listening to the feedback, and make the product more useful, and prettier. I would say: "Hey, can we put this comment on the website?!" and the testers said "Sure, no problem, I love the product, put me on there!" You need to ask for permission, but as you say, it's a wonderful way to get testimonials.

They're a great, low-cost resource for startups. I've used [Whatusersdo](#) for clients, but they're more expensive.

Nathan, what's your preferred social media channel, and why?

Right now it's YouTube. It used to be Twitter. I do love the simplicity of Twitter; the short blocks of text, and not needing to become friends before you can reach out to people. It's also easier to sift through feeds than it is on Facebook. Although I have more followers on Twitter, if I look at where the world is going,

it's going more towards video. Facebook is moving more towards video, and YouTube keeps on growing. Kids want to be YouTube stars, rather than athletes when they grow up! If I want a place in the future, I need to become good with video.

How's it been going? Has it had an impact on your business?

I do this [daily vlog](#), and there's a lot of experimentation. It's not growing really fast, but it's growing.

It's not easy to say that traffic from YouTube is going to the Highrise website, but it's a long game that I'm playing. People email and say they've been watching the videos and finally got their business started, and they've signed up with Highrise.

That's an interesting point. There was an interview I did with Rob Cubbon (Chapter 9), where he talked about the importance of thinking about the future and the "big picture," and setting time aside to work on long-term goals vs. just existing in reactive mode. Thanks for highlighting how you do this!

It's not like people are watching my videos, getting their credit card out, and signing up, but more about people following me for six months, and consuming my content, and *now* they're signing up.

People say they love how I'm helping them on YouTube. I use it as a place for constantly testing content. I post a new video every day, whether it's web design advice, business news, or going about my day with my 3-year-old and trying to draw lessons from it. When I see what hits, in terms of more likes on this video, or that video, then I'll write up a nice version of that in [Medium](#), and that Medium post will end up driving traffic back to Highrise.

I try not to take a myopic approach, because you can take one piece of content and spin it off into 5 other things and one of those might generate the impact that you want.

I'd say my Medium writing generates more traffic than my YouTube channel does, but it's all inter-related.

Medium seems to be helping a lot of entrepreneurs gain traction...

I think seeing your thought process laid out will be interesting for readers. A CEO thinks about tomorrow, and if you're always thinking about tomorrow, in many ways, that approach starts to take care of "today". It's like that quote by Sean Patrick Flanery: "Do something today that your future self will thank

you for.”

So, we’re talking about these different activities having different length sales cycles? The YouTube cycle is just longer...

Right. One way to do it is to dump a bunch of money into Google ads, but once the money runs out, the traffic stops!

You really need to invest in things that are going to be long term traffic generators.

A lot of entrepreneurs have their heads down, working on a product, and they’re not doing any audience building activities.

They’re focused on features, and I think they’re hurting themselves, because it’s likely that the product you’re working on today is not the product you’re going to be working on 5 years from now, and if it’s not, you’re going to be starting over with something and you *still* won’t have an audience to use that product. I feel you could reverse the priorities and build an audience whilst you’re coming up with that genius product.

Whilst you’re building a product, don’t forget about building an audience. I’m a big fan of the long game, and investing in meeting people online, and providing value, so that one day they’ll actually use the products you’re selling.

I really like what you said there. When you think about the concept of constantly starting from scratch with new products or services, it could be quite soul destroying! You're playing a bigger game than just what's happening today, or this month, or this year, and not just building, or making “stuff”...

I was with [Y Combinator](#) with a startup in 2011, and I made that mistake. I didn’t build an audience, we were paying for Google ads, but we ended up walking away from that product, and ended up starting from scratch again with the next product. I refuse to make that mistake again!

Now I try to encourage customers, and say: "This is the product, but you should really follow what we’re doing on Medium, Twitter, YouTube, and Facebook."

One day, if we move on to a new product, hopefully they’ll still be around to try the next thing.

How much time, do you or your team dedicate to marketing on a weekly basis?

I spend almost 100% of my time on marketing these days.

When BaseCamp spun off Highrise, they hadn’t worked on it since 2011 and it

was slow, broken and not quite right. At that time, I put a lot of focus into the product. Back then it was 10% marketing, 90% product. I was working on features every day. Now we're a larger team, there are people that can focus on the product and I need to crack the marketing challenges that we have. We have a great product, but not enough people know about us.

I should have started even sooner on marketing. People want good products, obviously, but it doesn't do you any good if nobody knows about them. I don't know what the magic formula would have been - 50-50% probably. Marketing is different for different people, but for me it's everything from Google ads, SEO, optimising the website and making sure it continues to convert better, and pricing plans, and making sure they can sustain the business. It's writing blog posts, it's posting YouTube videos. It's not just advertising. Everything that you're doing aside from working on your product, and building a team is probably attributable to marketing.

Where would you focus your energies if you were starting again?

I would have started with YouTube even earlier. Now there's video on Instagram, and videos on Facebook... But video is harder than writing. You've got to get good with video, and editing, *and* telling a good story, so the sooner you start, the better.

It's going to take a while... When I look at the videos I posted 18 months ago, I cringe. The lighting is terrible, the editing is bad... if you're going to be terrible for a while, just start practicing now!

I've been on Medium for a while, but I probably would have done more to pursue writing on other publications. I'm on the [Signal vs. Noise](#) publication from BaseCamp, which has a nice following, but I feel that I'm probably talking to the same group. If I want to diversify, and reach more people, I've got to be on other channels such as *The Mission*, and [Startup Grind](#).

I've only published a few things with them, and I should have considered other publications too.

I've been thinking a lot about that recently – publishing on your own site vs. other sites, and looking at how you can reuse, and adapt content to save time without affecting your SEO.

The current wisdom seems to be that it's best to check that Google has indexed your article on your blog first (if it comes up in Google searches, you'll know it's been indexed) before you upload it to Medium. If you do that, Google recognises your site as the "master" source for the content. *Then* you

can publish on Medium. The risk is that if you publish to other sites first, and then publish to your own site, it could appear to Google that you're duplicating / copying content, and your site may be penalised. Others recommend publishing part of your post on other sites, and linking to your site so people can read the rest. I'm experimenting - we shall see!

That's a tough one, the whole SEO thing, 'cos you're right, you're putting a lot of content on Medium as opposed to your own site. I think we made that mistake a little bit - putting our content on Medium, when we don't have enough content on Highrisehq.com. We're trying to crack that. It's totally ok to rewrite an article. You can write something once for Medium, then write a different version of it for your blog, or website. It's not that hard to do. Don't just change words for synonyms, but take another crack at it, alter it and add another two hundred words, or make it 200 words more concise, or pick different anecdotes...

We're doing that now to get more content on our website where all that SEO traffic is more valuable than it is on Medium.

Medium has been great for us. It's such a great social channel for spreading a message. That doesn't mean you shouldn't have your own blog, and your own content, but it probably means that you can't forget about Medium.

(You can use the [Medium content upload tool](#) to import your existing posts onto Medium.)

There's a constant learning curve with business, isn't there?

Can we talk PPC (Pay Per Click advertising)? Some entrepreneurs have said it doesn't work well for their businesses, because based on what they charge customers, they can't justify the cost. However, others have said it does.

What are your thoughts?

PPC is expensive and in many categories for CRM, it's insane! It teeters on not being affordable for us either.

There are very few wins there. Often, I don't think paid ads is the right way to go. However, it can help you test products, even if you're not making enough money from it. It can get the word out about a product early on when you're struggling.

I don't think it's sustainable for most people - you and your competitors are just giving money to Google, and the cost of your ad placements is going up...

So, no, I don't love it as a long-term channel. I'm much more of a fan of focusing on longer-term investments in audience building; finding people who want to follow you for years, who will help you to get your product out there.

Yes, you've got companies like Salesforce to compete with!

We even compete for keywords that Salesforce probably doesn't care too much about like "easiest CRM" - come on Salesforce, you're never going to be the easiest to use!

They make so much money from their Enterprise customers that it makes it hard to compete, even for keywords that probably don't mean that much to them but mean a lot to us, because the prices have been jacked up so high. As a new business, you should be careful with your budget, and spend your time on YouTube videos, writing, and talking to people on Twitter and Facebook.

Thanks for that Nathan. Are there any tools that have been useful for analysing traffic and customer activity on your website?

I've got three analytics tools running all the time. My favourites are [Clicky](#), it's a little old school, but I like it for real-time stats and web analytics, and we use [Google Analytics](#) a lot. It's a pretty good tool which is accessible for startups, because it's free.

There's also one called [Heap Analytics](#). You can basically turn it on and they measure everything. They're capturing every click and you can come across things that you may not have thought you'd be interested in before – "Oh, do people click on this link or not?" If you suddenly think of a question like that, they have the data, but it can get pricey pretty quickly.

Often with analytics tools, they have a free plan and then an enterprise plan, so be careful with them - they are going to be useful early on, but then they get so expensive!

We also use [Optimizely](#) a lot, but it's the same thing there. I think Optimizely has got a really cheap starter plan, but then it goes to Enterprise really fast.

I noticed that trend with analytics tools when I was researching products to include in [Entrepreneurial Espresso](#), which contains over 450 software applications for entrepreneurs. The issue is that customers get used to them, invest time in them, and then may have to abandon them because they can't afford to use them anymore.

Yeah. I'm getting annoyed because it keeps happening. I'm not going to call them all out by name, but I was using a tool that was 75 bucks a month and

then it became 175 bucks a month, and then it was: “This feature is 175 bucks a month, but if you want this feature it's *another* 175 bucks a month!” You think: “I’ve invested all this time into you, and now your prices have become astronomical...”

I understand it’s how they need to charge to run their business successfully, I guess, but I don't have a good feeling about it when it happens. There's another tool I won't name, but we got in with them when they were still using SaaS pricing, and we were spending a hundred bucks a month with them. We kept putting in more data, and then it became a thousand bucks a month. It was fine, as our usage was changing and I could see that, and we could afford it, but all of a sudden we found ourselves in this category where they said: “Well, we've got rid of the thousand bucks a month plan, and now you're going to need to get on the phone with one of our sales people to talk through your usage.” and I thought: “I don't want to get on the phone with a salesperson! I don't want to haggle over price. Just tell me what it costs, and keep it consistent!”

These are important points to consider if you’re considering pricing, and your sales process.

The beauty of SaaS is that you see how much it costs, get your credit card out, and get started. No booking appointments, or fearing that someone is going to waste your time, or sell you something you don’t want. Adding in the sales piece adds friction to the process. That’s such an “Enterprise” mentality, thinking that people *want* to speak to your sales department! Unless they have questions, they usually don’t. They just want to get on with buying and using the product.

Data storage / data centre costs rise as more data is stored, and companies are passing that cost on to customers, but it’s still extreme. In my software survival guide for [small businesses](#), I advise readers not to focus exclusively on the entry-level price when buying software, but to look at the second price tier, and the third before committing, and to think: “It’s fine now, but can I afford this product at the higher tiers?”, and “How soon will it be before my usage reaches those more expensive tiers?” If the answer is "no", or "soon" to those questions, keep looking, because it’s so disruptive to disengage with a product you’ve become accustomed to using, and to start hunting for a replacement.

I know! At a certain level when you’re trying to do new things with products, it involves sales people, and now I'm just stuck and I'm probably just going to toss

the product away, because I really don't have the time to deal with them.

I think there could be a gap in the market if somebody can make this work, and offer a reasonably priced tool for small businesses starting to consume more data, where there's not this huge price jump, and crunch point where businesses are looking at the pricing and saying: "Hmmm, what now?"

You would think so. That's why I like Clicky so much. They've been around for years. There are only a few employees, and I don't think they're VC funded, so they were able to create a sustainable business, and they charge reasonable prices. I think a lot of the analytics companies are VC funded, because they need to store gobs and gobs of data, but we all know that VCs want a huge return on their investment, and if you don't make money fast enough... Now the VCs are looking for results and you're going to be under pressure, and if you want to raise more VC funding this is where businesses start to say: "Look! We've moved into the Enterprise market!"

At that point, it's almost like there's nowhere else to go...

Can you tell us about your journey as an Entrepreneur, and now as a CEO? You've founded several businesses, and been through the Y Combinator program twice!

I always wanted to run my own business my dad was very entrepreneurial, so I always had a taste for it.

When I was in school I had an internship with a uranium processing plant. I worked as a chemical engineer (Nathan has a Bachelor's degree in Chemical Engineering.)

I worked with this entrepreneur; he was the plant manager, on the side he was going around measuring air quality for people. He also had plans drawn for a pizza restaurant he wanted to start... He was just inspiring, and I had every confidence that he would succeed.

When I got out of school I wanted to accomplish that too. I got a traditional job at Accenture, but I was always doing these little side hustles here and there. I was doing some consulting for a friend of mine, building apps and stuff. Then Y Combinator came about in 2005. I found out about it and we applied, and got in. Since then I've been starting and building new businesses. I did Y Combinator for 5 years, and did it again in 2011. That didn't quite work out, but I was able to turn that into [Draft](#), the writing software, and the Highrise job just landed in my lap because of the work I had done with Draft.

I couldn't have predicted how this path was going to go, I was just open to different opportunities. There have been struggles, especially with the first business where you wonder: "Can we do this? Is it working?" There's a lot of self-doubt, and a lot of experiments, and stuff that doesn't work... You lose your confidence over, and over again. That's it. That's the journey. That's what you go through.

I read an Elon Musk biography, and it was a good one. They were on the 8th or 9th rocket test, and on their last rocket. They had nothing left, and they probably weren't going to be able to raise any more money. Then it finally works.

You've got to be open to failure, after failure, and then other times things work, and get you onto the next challenge.

Uranium?!!! I want to ask you so many questions about that, but I don't want to go off track!

When you're starting a new venture, do you have a way of deciding when "enough is enough"?

I think one of the big things with knowing when to quit is when you feel that you're not learning anything anymore.

The way folks like Elon Musk achieve success is through experiments. He's always got another idea for an experiment.

If you're experimenting and not learning anything new from it, then it's time to quit, because you won't have an idea of how to fix things and make them better, so you can test *that* new hypothesis, and move to the next stage. But, if you *do* learn something, then keep going!

In terms of work - I'm not a fan of pushing myself past any physical limits any more. When you're young you think: "Oh, I can stay up all night," but you quickly get sick!

Back in the day at Y-Combinator, you'd get these kids who weren't taking care of themselves. People got scurvy, they weren't getting enough vitamin C... It's not worth it!

My dad was in the hospital recently, my mom has been sick, and it sucks. Life is so fragile, life is so fleeting it's not worth pushing ourselves to become more successful by hurting ourselves, by not eating right, by not working out, by not getting enough sleep.

I give up when it's 10.00 p.m. and I've got to go to bed to get 8 hours' sleep.

I don't try to physically overpower any problems I have with running a startup.

I love your comment about not trying to “physically overpower” the problems that you have within a business.

That can only be done for a limited time. We know that long term it's working smart, being disciplined, and having good systems in place that gets things done, but it's so hard not to use brute force!

We're all guilty of it. Recently I had a situation where I had some work to deliver, and I was up late, then couldn't sleep, and before you know it you're sick and it ruins a week, or two weeks. You might get a small win now, but what did you get yourself? Probably a net negative overall.

True! Sometimes the boundaries you set yourself are the most important ones.

I'd also love to talk about *customer support* and *customer success*. I've been watching the development of the SaaS market as a customer, but also out of interest with my business analysis “hat” on, in terms of the different strategies that companies are using. I've noticed the whole concept of “customer success” has really grown over the last few years, and tech businesses are really embracing that “when the customer succeeds, we succeed” philosophy. Right now there are many more emails sent out by companies to make sure you: i) Start using the product ii) Keep using the product, and iii) Remember the brand and its value to you. It's common for these emails to:

- Inform, and teach you about new, and existing product features
- Give you a nudge when you haven't used their app for a while
- Invite you to training webinars
- Deliver useful information which is not about the app, but is very relevant to customers (and drives traffic to the company blog)
- Ask if you need help getting the best from the product
- Summarise your weekly, or monthly activity (which in terms of behavioural psychology / behavioural economics are designed to motivate you accordingly, depending on whether you've been “good”, or “bad” at using the app) and to remind you how valuable the app is - “look at all the great things we've achieved together this week!”

How do you approach those concepts at Highrise?

There was a guy who approached me who wanted to work at Draft. What was

interesting about him was that he proactively helped a bunch of people in our customer support forum. I was busy and was having a hard time keeping up with customer support, but without me even asking, he was assisting people. I thought that if I hired him he would just get stuff done - I wouldn't have to tell him how to make a customer happy, he just knew how to do it and figure it out for himself. Not everyone is like that and can manage themselves. Others want guidelines about what they should do, and how to do their job.

So, to answer your question you need to have lots of people like Chris, and support them in making your customers happy without you having to be there all the time!

Look at [Zappos](#) (a shoe company renowned for excellent customer service.) The people at Zappos have been empowered to *just make customers happy*. Their process is great.

The big lesson is to hire people who feel very responsible, and to empower them.

Yes, that's hard to train or teach. I find that there's a lot of customer service work done on autopilot, where agents aren't really listening (or reading) carefully, or paying close attention to what is being said...

There's no 2-month Highrise class. That's not going to cut it.

In a startup, you need to be able to hit the ground running, and do whatever it takes, and to learn whatever you need to learn to do your job, which is to satisfy that customer on the other end of that email, and you need to be able to understand, and help them with whatever they're struggling with. There's definitely a personality trait there that you want to look for...

Have you been able to narrow down a way to find those traits? There's the Newcastle Personality Assessor (NPA) based on the "Big Five" personality traits that everyone has to a greater, or lesser extent - Agreeableness, Neuroticism / Emotional Stability, Openness, Conscientiousness, and Extraversion. I've investigated trying to select for high conscientiousness, to identify people who are achievement focused, but also disciplined, and thorough, but it's hard to do!

I think one of the things that helped me with hiring Chris was that he was just out there in the world writing blog posts and talking to people online.

Today, with social media you have a really good window into how people communicate with other humans without waiting until you get them in an interview. If someone's applying for a job, go and see how they talk to people

on Twitter. Follow them on social media. Are they helpful? Are they being constructive?

If they're not on social media, and if they're not answering questions, and they're not writing blog posts, then that's a problem too.

In an interview people might say: "Oh, I just haven't had time to do that," but we all have the opportunity to do it. There's nothing stopping you from signing up for a Twitter account and being a productive member of some sort of community. One of the things I look for is people who are out there publishing things, whether it's open source products, or just writing a lot and being friendly and useful. There may be ways of testing for that in an interview, but there are ways of monitoring how people interact with the world just using social media.

What you've said is far better... That's concrete proof. It's physical evidence, so it's probably better than a test. Thanks for that comment! (If you'd like to see what your strongest traits are, you can take an NPA test [here!](#))

What's your top cash flow, or money management tip for technical entrepreneurs?

It's just the way I run businesses, but I don't like to raise money, and I don't like to have a lot of debt.

Even with my first businesses, we only raised \$17,000 with Y Combinator, it was peanuts. After that, we didn't raise any more - we focused on getting customers to pay us. Even if they weren't the perfect customer, they were customers that could pay! People can be too obsessed with finding the "perfect customer", and have a narrow view of who their customer is, with good reason - they read *The Lean Startup*, which says that you need to find the perfect customer and do all these perfect experiments, but when you're struggling to pay the bills, it's not always easy to find perfect customers to pay those bills early on.

With Ink (one of Nathan's businesses), we had customers that wanted to use our products in ways that we hadn't even imagined, and hadn't wanted to use the product, but they were going to pay us \$30,000, and that was going to fund product development for the next five months. We did it again for a pharmaceutical company that wanted the software, and wanted us to give them a licence. We were a SaaS company with a monthly payment model, and there was this business that wanted to get our code, and they wanted to pay us money for it. I think it's ok to do that once or twice to pay the bills. Those

customers can give you the runway to find your perfect customers. Sometimes you need to get a bit creative and find other ways of getting money, and you may need to deal with some not-so-perfect customers.

So, be pragmatic...

Exactly. Also, be sensible with money. I don't understand the number of people whose first action as soon as they raise money is to use it to buy office space. It doesn't make any sense. You can get a co-worker pass these days for 50 bucks, and you can rent a desk somewhere, or work from your home.

There is no return on that money - you've just burnt it so that you have an office to sit in.

(On the topic of licenses, take care with your legal agreements when licensing your product to customers.

A common type of end user license is a [EULA - End User License Agreement](#), but if the client wants additional rights, you may need to call in a lawyer to help you cover all the bases and include the necessary clauses to protect your Intellectual Property. You can find a cheat sheet of free online contracts and legal resources for business use [here](#), but remember that tailormade contracts are likely to be a better fit for your needs.)

You can reflect, and let it sit in a bank account for at least a short period, because sometimes priorities change, but when it's gone, it's gone!

What's next for you, and for Highrise?

We need to get much better at marketing. We've gotten pretty good at optimising and improving our conversion rates through testing, but we need to get better about spreading the word, and getting people to check out our product. We've also been considering PR campaigns, and stunts to create a buzz this year.

In terms of YouTube, I'm getting better with experimenting and looking at what works - I'm not just doing the same thing on repeat. I'm looking at what's going to draw more people to the channel. I'm also spending more time on SEO on YouTube, looking at what kind of tags and titles will draw people in.

We're also building cool features, of course! Features are awesome, and customers love them, but that isn't part of the marketing flywheel.

You can't just keep shoving stuff on to your product to make people come and pay attention to you - you've got to find something a bit more sustainable, probably along the lines of more teaching, and more helping people.

Thanks Nathan. I wish you, and Highrise all the best! Where can people go to find out more about Highrise?

The best place is Highrisehq.com: <http://highrisehq.com>.



Highrise

You can find Nathan's YouTube channel here:

<https://www.youtube.com/nathankontny>.

You can reach him on Twitter here:

<https://twitter.com/natekontny>.

Footnote – Nathan has now left Highrise, but can be reached via the links above.

SECTION 2

Entrepreneur Interviews

CHAPTER 7

ANNE RAINBOW, BLOGGER

Anne, what do you do, why do you do it and how did you get into it?

I am the ScrivenerVirgin, blogging about how writers can make best use of this amazing software, and hosting the Simply Scrivener Special webinars to demonstrate Scrivener features and answer writers' questions. I am also the RedPen Mentor, helping writers to achieve their dreams!

I've always been a teacher at heart, and I love seeing others - especially writers - acquire knowledge and understanding and then enjoy success.

How long have you been an entrepreneur?

Even when officially employed, I've always also worked for myself: writing, teaching, etc.

Although RedPen goes back more than a decade, the current 'portfolio' started when I set up my website and began blogging about Scrivener in September 2015.

I've been helping writers to learn how to edit their manuscripts through online writers' groups and face-to-face workshops forever, but it was in September of 2016 that I self-published my book *EDITING The RedPen Way: 10 Steps to Successful Self-Editing*.

Since then, within the ScrivenerVirgin website,

<http://www.scrivenervirgin.com> I've set up the RedPen Editing, Training and Mentoring service.

What are the biggest benefits of entrepreneurship... and the downsides?

Working as an entrepreneur means I have total freedom to work on what I enjoy, when I like and in circumstances that I engineer for myself.

At home, I have an office to myself, and technology means I can work, using my laptop, anywhere in the world... so we travel too.

Writers and other artists can so easily become absorbed in their work, and turn into recluses, cutting themselves off from the 'real' world. I think the same is true of entrepreneurs.

When my children were young, they complained that I didn't show them enough attention. Now, on my second marriage, my partner is an artist, disappearing into his studio for hours. Individually, we are impossible to live with; together, we make a great team.

What are the most important lessons, or realisations you've had about life as an entrepreneur?

Although I am one person - one head and one pair of hands - I need to separate the various roles that need to be mastered.

I am the boss; I am the worker. I write the words, I have to market them too.

I am responsible for my own success - and need to apply myself to whatever needs to be done, when it needs to be done, and to complete everything in as professional a manner as I can. A very strong work ethic helps.

Waking early and having little need for sleep is a bonus, but it's also easy to wear yourself out, so time for recovery needs to be factored in.

Most important, is the time needed for the 'boss' to think ahead.

What are the top tools that have made a significant difference to your business?

I use so many...

- **Scrivener** is number one! I use that for everything I write, almost. (My accounts are in Excel.)
- I use **WordPress**, <https://wordpress.com/> for the ScrivenerVirgin site (and my husband's website) and have recently taken on the **Memberium** membership site software, <https://memberium.com/> and **LearnDash**, <https://www.learndash.com/> a plugin for WordPress sites where I can create courses.
- My website was originally hosted by **BlueHost**, <https://www.bluehost.com>, but I have since changed to **WP Engine** <https://wpengine.com/>, as it works better with my various plugins.
- Everyone says "the money is in the list" and I bought into **InfusionSoft**, <https://www.infusionsoft.com/> early on. I saw this email automation/marketing tool as another pair of hands, so was not put off by the cost. I was attracted to the potential - and willing to learn how to tap into that.
- I use **GoToWebinar**, <https://www.gotomeeting.com/> or <https://free.gotomeeting.com/> (for the free version of the software) for all my online training, such as the weekly Simply Scrivener Specials, and my monthly mentoring sessions, and for all the catch-up calls with my mentees.
- I rely on **CoSchedule**, <https://coschedule.com/> to keep track of two websites - mine and my husband's - and all our social media activity.

CHAPTER 8

COREY WILSON, ONLINE FREELANCER

Corey, what do you do, why do you do it and how did you get into it?

One night in 2013, I was browsing the Internet and found a link to Fiverr.com.

I'd already tried registering on Freelancer and Odesk, but they were so difficult to set up and required a ton of information before I could even start bidding for gigs.

I'd also need to pay extra to increase my number of bids and to pass different tests.

It didn't sound promising, so I didn't upgrade to paid membership with them.

I wanted something simple and I found it in Fiverr.

\$5 didn't seem like a lot of money, but the website looked modern and interesting, so I signed up. My one and only gig was beta reading ebooks. I download a lot of Kindle books and the Indie ones always have so many mistakes, from grammar to plot holes and ugly covers - I thought if I could read them before they got published, I could prevent a lot of common errors which would help the authors get better reviews and sales.

I posted the gig, it got approved and then I forgot all about it.

Then, one day I got an email telling me that I'd received an order. I logged in, read the book and got my first 5-star review. Then I added more gigs - things I already knew how to do: audio transcription, PDF to Word conversions, mind mapping, online research and data entry, and that was

the start of my business!

What are the biggest benefits of freelancing / entrepreneurship?

Unfortunately, as my monthly income increased, so did the health problems in my family - getting a full-time job was no longer an option.

I needed flexibility and time for waiting rooms, trips to the ER, and home care.

No employer would tolerate that much absence. That is the greatest benefit of freelancing. You have a deadline, but you don't have to work on your gig from 9 to 5, you can work on it at 5 a.m. You also get to work on so many diverse projects.

No two days are alike, and as you work, you're always thinking of ways to complete tasks faster and better, and about skills you could learn to improve your value. It's very dynamic.

Also, there is nobody standing over your shoulder telling you how to do your work.

You can do the job in whatever way you want, as long as the buyer gets what they need.

The downside is that you never know when your next order will arrive.

Summers can be very slow, with days without any orders. That can be nerve-racking if you have bills to pay.

Can you tell us the top tools that have made a significant difference to your business?

- The **Boilsoft Video Splitter** is great for splitting large video/audio files without re-encoding: <http://www.boilsoft.com/videosplitter>
- **WPS** is a free Office alternative (it's very compatible with MS Office):

<https://www.wps.com>

- I use **Canva** for book covers, and pretty much anything to do with images: <https://www.canva.com>
- For mind maps, flow charts and organizing information, I use **Xmind**: <http://www.xmind.net>
- For making notes on PDF documents when reading ebooks, I like to use **Foxit Software**: <https://www.foxitsoftware.com>

You can check out Corey's gigs here: <https://www.fiverr.com/carbor>

CHAPTER 9

ROB CUBBON, CONTENT CREATOR

Rob, what do you do, why do you do it and how did you get into it?

I used to work in graphic design in London doing desktop publishing work, and I was doing that for a long time. Then I started blogging.

That was back in 2006. It was quite easy to rank for certain keywords in those days, and I began to get design work that I could do from home.

That's how I got started.

Two years after I started blogging, I was able to stop working for other people.

What are the biggest benefits of entrepreneurship?

The benefits of being an entrepreneur?

Mainly freedom, but there are lots of benefits. Currently I'm living in Thailand - that's a huge benefit!

I consider meeting people to be a benefit too. I'm in a great place; there are a lot of Western and Thai entrepreneurs here. There's a centre for it, so I get to meet really interesting people at the local entrepreneurial meetups.

On top of that, you're free to choose your hours and you don't have to commute, so that immediately saves you two hours a day.

Also, if you "go out to work" you don't have a choice of what jobs you do.

The jobs I don't want to do I can outsource and give to other people, and the jobs I do want to do, I can do them myself - although it doesn't work out like that all the time!

It's freedom of choice – I can choose what to do, when to do it, where to do

it and how to do it, without anyone telling me to.

What are the most important lessons, or realisations you've had about life as an entrepreneur?

It depends what sort of person you are, but I've learnt that what I'm good at is getting things done. I'm not a perfectionist, in fact, I'm quite the opposite, but I've learned how to use that to benefit me.

I've produced over 20 courses and 10 books, among other things, and the lesson I've learned is to finish things as quickly as possible, and to move on to the next thing.

So, with courses, the first one wasn't great, as you can imagine, but by the 5th or 6th they started to sell well. The other side of it is consistency, doing things quickly and to keep on doing them, not to move on to something vastly different, but to keep on the same track, so you can become good at something and spread your bets by creating different products.

You've got to find your own way.

This is where it can be a very individual type of game and that is where copying other people isn't necessarily the best thing to do.

What are the top tools that have made a significant difference to your business?

- For cloud storage, **Dropbox**, <https://www.dropbox.com/>
- **LastPass**, the password management tool, <https://www.lastpass.com/>
- **Skype**, <https://www.skype.com>

They really help me with outsourcing, because I can share different folders with

various people around the world and get those people working in concert. I wouldn't be able to do it without those tools and the ability to get things done securely.

My best tip for productivity is an offline one – *set yourself a goal every day*. For example, creating a video every day, or when writing a book, I'll make sure I write 500 words every day, so whatever I'm doing is finished within a month.

I set myself a short term, medium term and a long-term goal, on top of what I'm doing whilst I run my website business, <https://robcubbon.com/> each day.

I make sure that I also do that extra task which goes towards a mid-term, or long-term goal, and if I do that, I'm contributing to my productivity.

It is difficult, especially for entrepreneurs, because you're dealing with all sorts of things and want to get involved in others and find yourself pulled all over the place, but I find a good way of grounding myself is to complete that one extra task a day.

Maybe it takes an hour or so, but it builds towards your future vision – that's really helped me.

CHAPTER 10

MICHAEL SOKOLIN, THE PUBLIC SPEAKING COACH

Michael, what do you do, why do you do it and how did you get into it?

I run public speaking classes, and offer different courses based on customers' skill levels – I deliver beginner, intermediate and advanced courses.

In the past I hated public speaking!

I always struggled with it, and hated it my whole life. I despised anything to do with performance; reading in class, doing presentations in school, at university, and at work...

I got into this line of work because I wanted to get better myself and to help others get better.

When I first started attending public speaking courses and seminars about 5 years ago, I realised how bad some of the services were and I spotted a business opportunity in the market. I saw the problem, and the commercial aspect to it - a lack of good teaching, a lack of structure in delivering the courses, and an inability to get results for students.

I have trained as an actor as well, and noticed much more growth in myself and the people around me in developing through acting training.

As a result, the basis of my classes at <http://www.michaelsokolin.co.uk> is threefold:

1. Personally having been in a place where I hated public speaking, and having gone through the journey myself, now wanting to help others because I understand how they feel.

2. Seeing that there's a lack of good training available.
3. Having undergone acting training, performance training, clowning, stand-up comedy and improvisation, and having integrated those to help people boost their confidence in public speaking.

How long have you been an entrepreneur?

I've been an entrepreneur since I was 13 or 14 years old.

Whether it was selling candy, or washing cars, I'd always come up with ways to make money.

I've been involved in different businesses; my first formal business venture was owning a nightclub. It didn't work out, but there was the concept of running events in a stylised way and after that, this public speaking business came about.

What are the biggest benefits of entrepreneurship?

For me personally, the biggest benefit of being an entrepreneur is the ability to stretch your mind – you're essentially growing as a person by constantly being on your toes, because you *are* the business.

If I have a lazy day or week, the whole business stops, so there is pressure to think and come up with ideas, but this sparks your creativity and motivation. It makes you think on your feet and become more alert, and you become more intelligent almost, and more organised!

I also like the freedom of doing things how I want to do them.

I struggle with working for others, which is probably one of the biggest traits that entrepreneurs have - that difficulty in working for someone else and having to bow to someone else's command... That's one of the hardest

things.

I always have my own ideas about how I think things should be done and found it hard to sacrifice those for what someone else was telling me, so it's good to be able to do things my way!

What are the most important lessons, or realisations you've had about life as an entrepreneur?

My biggest realisation is that it's not as easy as I thought it would be!

There is freedom, as I've mentioned, but there is also a lack of freedom which relates to time. It can be hard to take time off – I've been craving a holiday for ages.

I'm planning one now, but I won't relax 100% because I'm going to be thinking about my business and my courses and who will be attending. As an entrepreneur, you're not getting a fixed salary, and it's harder to switch off and not think about anything on holiday and at the weekends. It takes time to build an infrastructure that employees can work within so that you don't have to think so much about some of these things.

There can also be an illusion, or romanticism about what it means to be an entrepreneur, but it can be tough in reality.

It's been 4 years since I started running the business, and in the next year I hope to have more time freedom!

What are the top tools that have made a significant difference to your business?

Since I run events, event platforms like **Meetup**, <https://www.meetup.com/> and other event / networking websites like **Funzing**, [www.funzing.com/](http://uk.funzing.com/) (UK) / <http://uk.funzing.com/> (US) and **Wonderush**,

<https://wonderush.com/> are helpful.

Email service providers like **MailChimp**, <https://mailchimp.com> are convenient in terms of keeping my contacts organised, sending people emails and maintaining a database.

I'm in the process of setting up a CRM system – I quite like **HubSpot CRM**, <https://www.hubspot.com/crm/>. It's a good way of keeping your leads organised and to keep track of customers, potential clients and your communication with them.

CHAPTER 11

SEÁN, THE TECHNOLOGY BUSINESS OWNER

Seán, what do you do, why do you do it and how did you get into it?

I run WPStrands and we are going to change the view of website maintenance from a non-essential luxury, to an affordable necessity.

We do this for business owners who are delighted to have their WordPress website maintenance (configuration, backups, updates, security, coding, performance checks etc.) done for them at: <https://wpstrands.com>.

After 24 years in a corporate career I wanted to do something meaningful for online business owners, and for myself.

How long have you been an entrepreneur?

Two years, but it feels like I only started doing it properly in the past 6 months!

What are the biggest highs and lows of entrepreneurship?

The highs:

- Learning and freedom - I love both.
- Knowing I'm doing something that genuinely helps people.
- Seeing how happy a customer is when you get them out of a jam.
- Every new customer we work with.
- Being able to be with my daughter more - for important moments, or when she's sick.
- My biggest high was getting my first large corporate client. It's interesting to

be providing specialist services to the kind of companies I used to work for.

The lows:

- The doubt and insecurity. It's a predator constantly circling, ready to pounce at random times, though the circle is slowly getting wider and wider!
- Getting way off schedule because of client problems.
- Dealing with the naysayers, including close family and friends. If they can't be convinced to believe in you, then just fall back on being stoic.

After 6 months with no clients, thinking: *"Why am I wasting my time on this? I've no idea what I'm doing and no-one cares."* The thing that kept me going was knowing that 80 million WordPress websites exist. Surely the owners of a few hundred of them would be interested in my help if they only knew about me!

Both the highs, and the lows come and go. Thankfully with increased experience, confidence and knowledge, the ratios of highs to lows increases.

What are the most important lessons, or realisations you've had about life as an entrepreneur?

- Most people do not work very efficiently, but you can learn lots from those who do. Smart time management and routines are important.
- Most people are not reliable, but you can learn lots from those who are.
- Most people do not have your expertise, and they ARE willing to learn from you.
- Selling is not evil, or greedy.

- There are no secrets. From the ancient Greeks, through to Carnegie, Napoleon Hill and Tony Robbins, the most important things have always been written about: purpose, belief, desire, persistence and consistent work. There is very little about getting things done that hasn't already been written.
- It's hard. Much harder than you think!
- It's rewarding. Much more rewarding than you could ever imagine. The simple satisfaction of waking up every day eager to get to work and help people is incredible.

What are the top tools that have made a significant difference to your business?

- **Buffer**, www.Buffer.com for social media scheduling.
- **Google Calendar**, <https://calendar.google.com/> for scheduling, planning, and keeping myself on track.
- **Slack**, www.slack.com and **Skype** www.skype.com for communication.
- **Canva**, www.canva.com for images of all kinds.
- **Piktochart**, www.piktochart.com for images, and charts.
- **Irfanview**, www.irfanview.com for quick image editing and resizing.
- **Wave**, www.waveapps.com for invoicing.

You can find out more about how Seán got started at:

<https://wpstrands.com/bootstrappers-journey-100-customers/> .

SECTION 3

**ENTREPRENEURIAL ESPRESSO™ (SAMPLE:
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(SAMPLE)

Over 450 business-boosting and productivity-enhancing tools to take the hard work (& guesswork) out of running your enterprise



Author K.N. Kukoyi

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ENTREPRENEURIAL ESPRESSO™

(SAMPLE)

Over 450 business-boosting and productivity-enhancing tools to take the hard work (& guesswork) out of running your enterprise

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SECTION 1

The productivity zone:

**Getting organised, staying
motivated & managing processes &
priorities**

CHAPTER 1

Getting Started



If you're not taking advantage of the many mobile, desktop, and web-based applications that exist to help small businesses, you are missing out on a wealth of opportunities to make your working life easier.

This book is called *Entrepreneurial Espresso*, because finding the right tools can be the "boost" that can propel you towards faster results, and smarter, more productive ways of working.

The purpose of this book is to demonstrate ways to use technology to save time, lighten your workload, and to help you to achieve this in a cost-effective manner. If you're not a technically minded person, please don't be concerned - you'll find plenty of user-friendly options available here!

How will this book help you and your business?

Let's review some of the topics that will be covered. There are 4 sections in this book:

Section 1 is the ***Productivity Zone***, and in the next chapter, we'll start with **life management tools**, and software for **setting goals, managing your diary**, and

organising your day, and you'll discover the **working styles, routines and patterns** that are right for *you*.

We'll also review tools for **developing effective habits** which **reduce distraction and procrastination**, and we'll review approaches and tools to help you *get focused, and stay focused*.

Whilst in the **Productivity Zone**, you'll also find **productivity software and techniques** to help you analyse where time is being spent, lost, or stolen... and what's stealing it.

At the end of section 1, we'll look at the benefits of documenting and organising your business processes, and ways to **get bots working for you 24/7** to relieve you of those repetitive tasks that you've been juggling!

In Section 2 there are tools to help you manage, and streamline your **business finances, accounts, and expense management processes**. You'll also find tools to help you set up **fast and efficient invoicing and payment processes**.

This section also includes ways to manage your **computers, files and documents more securely**, and minimise your risk of experiencing **data loss**, or becoming a victim of a **hack, virus** or other form of **malware** attack.

We'll also discuss software that will help you to **coordinate and manage tasks and projects**, (whether you're a team of 1, of 10, or 100) and tools for **smooth and efficient communication** with your customers, or team members whether they are local, or hundreds, or even thousands of miles away.

Whilst in section 3, we'll review software for **sales, marketing and customer care**.

First, we'll consider **email marketing** and **marketing automation** tools to help you set up processes to **attract, and convert website visitors into customers**.

Then we'll review products to help you to coordinate your **social media profiles** – from posting, to **social listening**, to managing a **social inbox** that gathers messages related to your business from across social media in one place. There are tools to help you manage multiple social media accounts all at once, as well as specialist software for marketing via *Facebook, Instagram, Pinterest, YouTube and Twitter*.

Because marketing is a key activity for most businesses, there are **5 chapters dedicated to marketing** in this book, full of tools and ideas to help you to **promote your products and services**.

Next, we'll look at **tools for gathering data** including opt-in forms, along with **reporting and analytics software, business dashboards and data visualisation tools**. These products will help you to stay in touch with customers, and to understand what people do when they visit your website, as well as keeping track of sales, and progress against business targets. In this section of the book, you'll also find a selection of **CRM**, and **sales products** designed to help startups and small businesses.

Finally, in section 4, we'll consider a whole host of quick and efficient ways to **create and manage written, visual and audio-based content** for your website, or blog. You'll find tools for managing text, and creating **videos, infographics and GIFs** from scratch, plus easy-to-use software for **editing and annotating images for social media marketing (SMM)** and general **marketing purposes**.

Towards the end of the book, you'll find some **risk management tips** to consider when searching for software, and some important **legal considerations and regulations** to take note of.

Lastly, all work and no play made Jack and Jill very dull, so at the end of the book, you'll also find software and apps for **relaxation**, and **fitness**!

Whatever type of entrepreneur you are, or hope to be, this book contains software, and resources that you can use and benefit from.

Use it to make positive advances across your business, or as a source of ideas and inspiration, and as new challenges, or questions arise, you can refer to the different chapters and sections and pick out tools and tech to help.

By the end of the book you will have a set of tools and systems to help you run your business. All you need to do is systematically read through the book, setting-up, upgrading or automating your processes wherever you feel this is necessary, and enjoy the benefits!

If you're *bootstrapping* your business using your own financial resources, you'll be pleased to know that the software featured in *Entrepreneurial Espresso* is very affordable.

The service providers included in this book offer low-cost (and often free) starter plans, and almost all have “try before you buy” options. However, if you're a larger, or more well-established company, you will also find service plans available which meet more complex needs.

We all like to compare notes – it's helpful to know how other entrepreneurs are solving similar challenges. Therefore, this book includes not just information on products, but contains interviews with freelancers, tech entrepreneurs, content creators, public speakers and bloggers and their views about entrepreneurial life - and their most valued business tools.

From listening to the comments made by small business owners and entrepreneurs about running their businesses, I know that with so much to *do*,

it can be far too easy to get distracted, or to become permanently “stuck” in action mode, leaving less time for regular reflection on questions such as:

- *As CEO/founder/owner of my business, where would my time be best spent?*
- *Where do I want to take this business, and by when?*
- *What is and isn't working? What should I do about it?*
- *Who (or what) could help me?*

Would you agree that the fewer resources one has, the more efficiently those resources need to be managed?

I don't think it's a coincidence that Rob and Anne, the two entrepreneurs interviewed in this book that have been running their businesses the longest, both talk about the importance of allocating time and attention to long-term goals. They make time for big picture, executive-level thinking, as well as the "day-to-day grind." (To read their stories, look for *Entrepreneur Interviews* 1, and 3 in the contents section.)

Having affordable, reliable services at your disposal to support, or drive your business are a weight off the mind of any entrepreneur.

With these in place, your business can run efficiently and you will have time to focus on growth, and more strategic activities.

How to use this book

Each chapter and subcategory of product is clearly labelled so you can quickly

find the type of tools you need.

You'll find everything from web-based Software as a Service (SaaS) products that run “in the cloud”, to mobile apps, desktop apps, and browser plug-ins and extensions.

Check each entry to see which platforms the software is available on.

As Chrome has such a huge selection of highly rated extensions, whether you're a Windows, Mac, or Linux user, you may wish to consider downloading Chrome to your computer if you don't already use it, so you can take advantage of the options available.

Even if you're not from one of the “big 4” countries for Amazon book purchases (the US, UK, Canada, or Australia), you’ll find that most products can be used regardless of location. You will also notice that some are available in multiple languages.

A note about prices

Many of the products featured have between 1 and 5 different price points depending on the level of service required by each customer. Where possible, details of the first two pricing tiers (correct at the time of writing) are included in product descriptions for 2 main reasons:

1. You'll be able to quickly judge whether a product fits in with your budget.
2. When buying software, it's good practice to consider in advance how much the *next tier* of service costs.

Why? Well, if the cost at the next tier is affordable, then as your business grows you won't have to switch products again due to cost (assuming that you're satisfied with the service, or a better option hasn't come along.) Switching products can cause disruption, and waste time and energy in "lifting and shifting" your data, *and* having to learn how to use a new product, so find good products that you can stick with as you expand!

Use of images

Sometimes it can be difficult to visualise the precise benefits of software; therefore, this book includes images of some products.

This can make the difference between a product sounding "mildly interesting" and getting that a-ha! moment where you can see *exactly* how a tool could add value to your business at a practical level.

Unfortunately, it would be impractical to include over 450 images to represent every product in this book, but you will find some to inspire you!

Why these tools?

The products in this book came to be here through a combination of recommendations, many hours of research, reputation and ratings, my own experience, and product longevity.

That being said, there *are* a mix of newer and more well-established software applications featured in this book, and products in Beta; the term used to describe an early version of a product, are pointed out where possible.

If you're an "early adopter" who loves to follow the latest innovations from the funkiest new startups, please visit chapter 32 which has links to many sites that are a gateway to new tools and tech.

If you're concerned about the long-term prospects of your software, or would like step-by-steps tips for choosing the right software, please visit chapter 30 and review the information there.

Chapter 30 also contains legal, and security-related warnings, and other important tips to consider when buying new software.

Who am I?

I've spent more than 11 years working in roles that combine technology, business, and consultancy; including product management, project management, and business analysis.

I advise tech startups and small businesses, and work in, and lead Agile software delivery teams that handle the concept, build and delivery of commercial-grade web and mobile apps used globally. Along the way, I also started working on business ventures of my own.

Software, business and its evolution are things that I'm passionate about, and this is my 4th book for entrepreneurs and small businesses.

My experience has given me a view of business life from several angles:

1. Helping businesses of all types to expand their business capabilities through the selection and implementation of software. This includes safeguarding their interests by considering the risks involved, and anticipating possible challenges.

2. Working with businesses to deliver software built from scratch, or to customise existing software to meet their needs, ensuring that each business gets a good return on their investment.
3. Analysing, and designing working processes that improve business efficiency.
4. As a business owner, who needs intelligent, easy-to-use, reliable software in the same way as you do!

You'll find several FREE downloadable resources available with this book:

1. **The KSS log** - a simple, but powerful tool for habit tracking, and reviewing the progress you are making within your business. When used consistently, it has the power to improve your business: <http://bit.ly/EE-KSSLOG>
2. **Access to 3 free Customer Care Trello boards** to copy and use: <http://bit.ly/EETRELLO>
3. Cheat sheet of FREE **online contracts and legal resources for business use**: <http://bit.ly/EELEGAL>
4. My **top 20 podcasts for business and finance**: <http://bit.ly/EEPODCAST>
5. **50% off** my full-price courses: <http://bit.ly/EE50COURSE>
6. Free, and low-cost **website-builder tools**: <http://bit.ly/EEWEBSITES>

I hope you enjoy using the tools in *Entrepreneurial Espresso* to help you manage your business.

Whilst researching this book I discovered tools that have saved me time, introduced me to new ways of working, and made my life easier. May you receive these benefits, and many more!

CHAPTER 2

The organised life: Tools to manage and organise your work and personal lives

"Get life under control!", "Organise your brain!", "Remember everything!",
"Work smarter!"

These are the marketing slogans used by some of the most popular life management tools on the market.

Let's explore what else this software can do for you!

Because achieving a *work-life balance* can be an ongoing struggle, this chapter includes tools to assist you with both work and personal tasks.

Managing your workload

Any.do, calls itself "the ultimate app for getting things done."

Maintain your lists, tasks, meetings and reminders in one central place and the Any.do life manager will synchronise them across your Android, iOS, or desktop / web enabled devices. Tasks can have times and locations set against them and there's a calendar where you can plan by day, week, or month.

You can also share lists and assign tasks to others, so you can choose to do tasks yourself, or delegate them. There's a free version of the software, and the premium version costs from \$2.09 per month for access on 1 device.

There's an Any.do assistant coming soon! Artificial Intelligence will be used to scan your tasks and the assistant will let you know what else it can help you with, including groceries, gifts, cleaning, repairs and laundry.

Register here for early access: <https://www.any.do/assistant>

<https://www.any.do/>

iTunes: <https://itunes.apple.com/in/app/any.do-to-do-list-planner/id49732857>

Google Play:

https://play.google.com/store/apps/details?id=com.anydo&hl=en_GB

The successful SaaS company *Slack* was "born" in **Workflowy**. This is where the original *Slack* team developed their idea and managed their notes!

This tool is used by high profile journalists, CEOs and successful founders to manage their affairs. Get organised, manage lists and notes, and arrange more complex tasks and information into hierarchies, with subcategories that can be navigated easily.

You can try Workflowy without signing up for an account, which is great for getting a quick idea about whether you like using it.

There are both free and paid versions of the tool. The paid version includes unlimited Workflowy lists, integration with Dropbox to back up your data, and password protected notes for \$4.99 USD per month, or \$49.99 USD per year.

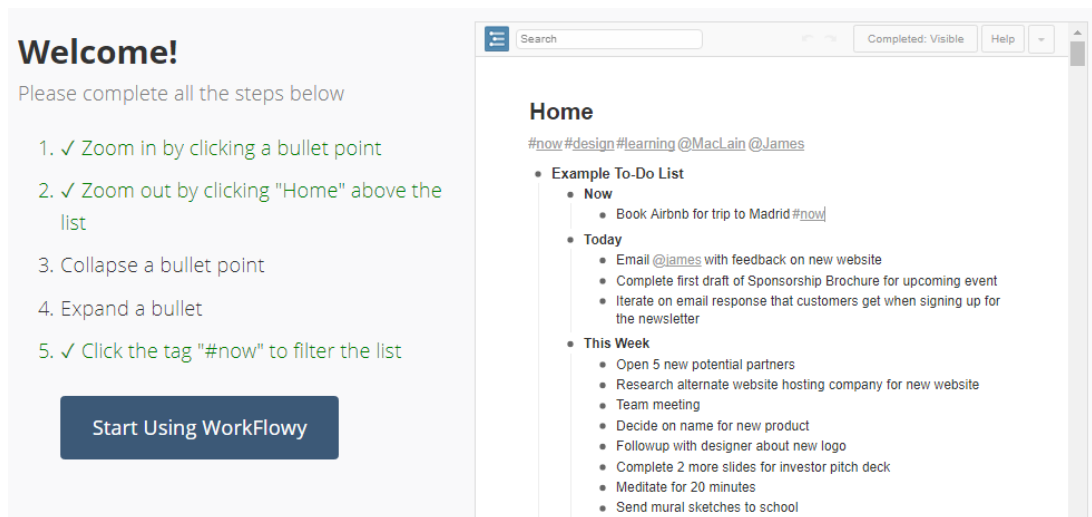
<https://workflowy.com/>

Google Play:

https://play.google.com/store/apps/details?id=com.workflowy.android&hl=en_GB

iTunes: <https://itunes.apple.com/gb/app/workflowy/id551139514?mt=8>

There's a Chrome extension too.



The Workflowy app.

If you have a partner, or family to consider, you may just fall in love with the **Cozi Family Organiser**.

With Cozi you can create new tasks and merge your own activities with other calendars.

In fact, you can keep track of the whole family's activities in one place. The tool has a colour-coded calendar, so you can assign each event, or family member a colour for quick identification, and includes recipes and meal planners and a place to make shopping lists.

Cozi is free, whilst Cozi Gold offers an ad-free service, shopping features, a mobile calendar, birthday alerts and more.

www.cozi.com/

iTunes: <https://itunes.apple.com/us/app/cozi-shared-calendar-reminders-grocery-list/id407108860?mt=8>

Google Play:

<https://play.google.com/store/apps/details?id=com.cozi.androidfree&hl=en> G

B

If you're not using **Evernote** yet, why not?

I was late to the party with Evernote myself, but I'm a fan now!

Store notes, documents and photos, import articles from the web (including links and images) via its *web clipper* functionality, set reminders, and speak notes into Evernote with its built-in microphone (especially great if you're using a smartphone and don't like writing long notes on it.) You can create checklists too - honestly, it's so versatile, there isn't much it can't do!

Assign tags to content, and group it into subjects, or categories called *notebooks* - the app is fully searchable so it's easy to find what you're looking for. You can also share content with others. Evernote automatically syncs across all your devices including smartphones, tablets, and the desktop version of the software.

Evernote Basic is free, whilst Evernote Plus offers more storage and costs \$3.99 USD per month, or \$34.99 per year.

<https://evernote.com>

Here are links to download Evernote for Android, iOS, Chrome, Windows and Mac:

<https://evernote.com/products/>

For a quick start with Evernote, there are a number of business templates that you can use. There are templates for calendars, meetings, project management, marketing and more.

Once you have an Evernote account, you can add them to your profile for free with a single click!

<https://help.evernote.com/hc/en-us/sections/200930137-Templates>

Then there's **Skitch**, made by Evernote - perfect for screenshotting, sketching, annotating and sharing ideas.

<https://evernote.com/products/skitch>

I don't just like **Microsoft OneNote**, I love it! This note making tool supports traditional notes written in the same way as you would write in a Word document, however, it also creates "boxes" around your text that you can drag, reshape, and reposition anywhere you like on-screen, much like having a scrapbook of different ideas on a single page.

You can add attachments of any kind (they'll be updated in OneNote if you change the original file) and paste images anywhere on a OneNote page, and share notes with other OneNote users via the web or an office network.

Text colours, sizes, and fonts can be adjusted, you can draw within it, create or insert video, record audio, take screen clippings, and add checkboxes to create to-do lists.

Notes are auto-saved, fully searchable and are stored in tabs that can be grouped and nested under each other.

If you use Outlook, you can send emails to and from OneNote. The software can also do basic maths - just type in a sum and hit return after the = sign and you'll be given the answer... I could go on, but you get it, OneNote can do everything including make the tea, as we say here in England!

If you have a Windows computer, type OneNote into the *Search Windows* box to locate it.

There's also information on how to get OneNote here:

<https://support.office.com/en-gb/article/Get-started-with-OneNote-and->

[notebooks-4beb2128-51d9-4531-a4e0-078f605bbfea](#)

Microsoft store: <https://www.microsoft.com/en-gb/store/p/onenote/9wzdncrfhvjl>

iTunes: <https://itunes.apple.com/gb/app/microsoft-onenote/id410395246?mt=8>

Google Play:

https://play.google.com/store/apps/details?id=com.microsoft.office.onenote&hl=en_GB

Nozbe will help you get your affairs in order. Create new projects, then add reminders, tasks, and sub-tasks, and set priorities.

You can send yourself reminders, share tasks and comment on them, and if you email notes to Nozbe, they'll be automatically transformed into tasks.

Nozbe integrates with Box, Dropbox, Google Drive, and Evernote so you can back up your notes. (Evernote can also be synced with Nozbe, so that searching Nozbe also searches your notes in Evernote.) Nozbe is free for 1 person, the PRO plan costs £6 per month billed annually, £8 when paid monthly for 2 users. Nozbe shows prices based on location, so visit the site to see the cost in your local currency.

www.nozbe.com/

Get Nozbe for the web, Macs, Windows, Linux, iOS, Android and Apple Watch here: <https://nozbe.com/help/#apps>

Todoist is useful if you want to break more complex tasks down into visible segments that can be managed using the software. The software is free for up

to 5 people contributing to the same project, and 80 active projects.

You can share projects, set colour coded priorities, collaborate with team members and assign tasks to others. Notifications can be sent to the group if things change. Recurring due dates can be set up and the app will automatically sync data across all your devices. **Todoist Karma** is a service that provides graphs and charts based on your activities.

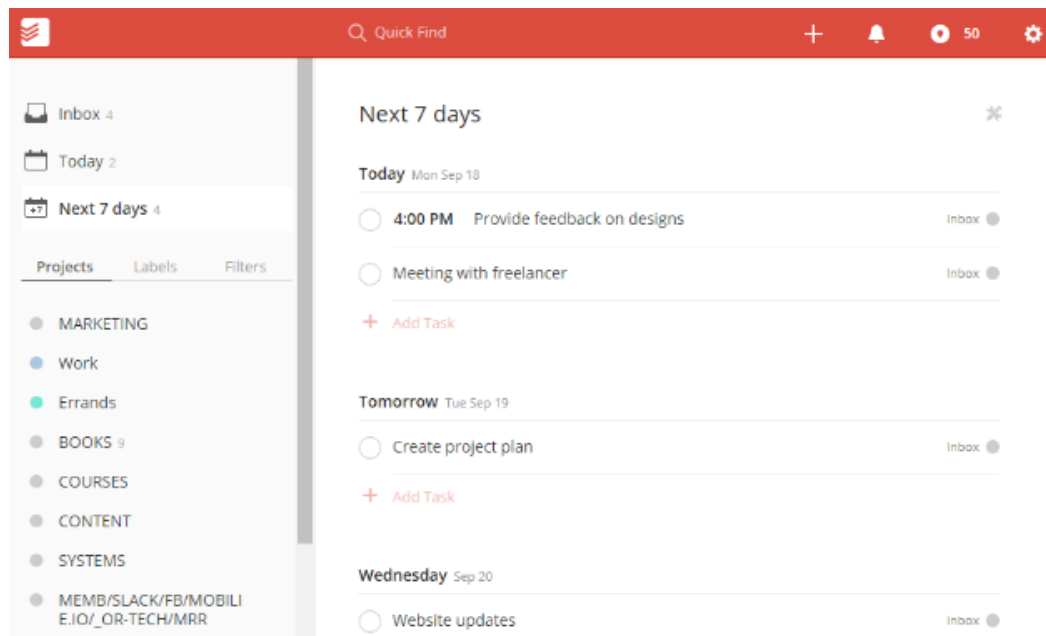
Todoist is free, but if you pay for the software you can add tasks to Todoist via email, transform emails into tasks, set reminders, and synchronise tasks with iCal. Paying customers also get automated backups.

The plan above free costs \$27.99 a year for 200 projects and up to 50 collaborators.

<https://todoist.com/>

From the Todoist homepage, you can download Todoist for iTunes, Android, Safari, Chrome, Firefox, MacOS, Windows, and Gmail!

Inside Todoist. An overview of the next 7 days.



Remember The Milk is a popular task and list management application which integrates with a number of other products, including Gmail, Google Calendar, and Evernote. Users can share lists, and enjoy auto-sync functionality between devices, and with Microsoft Outlook.

It's possible to search within your tasks, set due dates and priorities, set up repeat actions, and tag your content.

A basic free plan is available, and the PRO plan costs \$39.99 per year, which includes unlimited sharing, unrestricted sorting and reminders via email, SMS, mobile, IM, and Twitter.

Web: <https://www.rememberthemilk.com/>

Google Play:

https://play.google.com/store/apps/details?id=com.rememberthemilk.MobileRTM&hl=en_GB

iTunes: <https://itunes.apple.com/gb/app/remember-the-milk/id293561396?mt=8>

The **Drafts** app, is available at the App Store and for Apple Watches.

Drafts is a quick way to take and share notes. Notes are stored like a paper stack - you get a fresh sheet each time you make a note and they are automatically saved for you. Share notes via Twitter, Facebook, email, and to your calendar. There are integrations with Microsoft OneDrive, Google Drive, Dropbox and iCloud.

Drafts costs \$4.99 USD from iTunes.

<http://agiletortoise.com/drafts/>

iTunes: <https://itunes.apple.com/gb/app/drafts-quickly-capture-notes-share-anywhere/id905337691?mt=8>

Managing travel plans

Do you travel much?

If so, **Triplt** will save you time, and help you manage your plans by organising and storing all the elements of your trip in a central view.

Just email plans@tripit.com with your travel details and Triplt will organise the details for you in a *master itinerary* that you can access across multiple devices.

The app sends real-time alerts about your travel plans, can suggest alternative flights if you're travelling by air and driving directions if you're travelling by road. There's also a free route planner:

<https://www.tripit.com/destinations/free-route-planner/>.

Triplt is available online and for Android and iOS mobile devices.

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

iTunes: <https://itunes.apple.com/gb/app/tripit-travel-organizer/id311035142?mt=8>

Google Play:

https://play.google.com/store/apps/details?id=com.tripit&hl=en_GB

Voice-activated assistants

What about hands-off life management tools? Let's take a look at some voice-activated assistants!

Apple has Siri (after set up, say "Hey Siri" to wake "her" up), Amazon has Alexa (use the command "Alexa" to start), Google has Google Assistant (use "OK Google" to begin), Microsoft has Cortana (prefix your query with "Hey, Cortana"), and Galaxy mobile devices have S Voice (wake up your assistant with a "Hi Galaxy!"). Of course, you can also click the microphone icon in your Chrome web browser when using your PC, or laptop to ask Google a question, instead of typing it.

There are so many options, (your mobile devices may include others too) that it's highly likely there are several voice activated assistants that you can access *right now*.

Are you making good use of these services?

How could you put them to work to save yourself time?

Let's look to Alexa for a more detailed example of what can be achieved.

Alexa now works on an increasing number of devices, including *Echo*, *Echo Dot*, *Tap*, *Echo Show*, *Fire TV*, and *Fire Tablet*.

You can use voice commands to browse the Internet, create task lists for work, or for your grocery shop, or to buy goods online. You can also “command” Alexa to play music (you’ll find software for playing concentration and focus music in chapter 4), and to control smart-products in the home using Internet of Things technology (IoT), and to access weather reports, and more!

Here are 14 ideas for useful home and business-related Alexa commands:

- Dictate messages
- Post to *Slack* groups
- Check your bank balance
- Call other Alexa enabled devices
- Order lunch
- Request an exercise workout
- Make phone calls
- Do Internet based research
- Check airport security waiting times
- Request services via *TaskRabbit*
- Request a news summary
- Listen to an audiobook
- Set timers and reminders
- Order an *Uber* or *Lyft* cab

Alexa can already be used with some business analytics tools such as *Microsoft Tableau* and *Adobe analytics*, so look out for more ways to use voice commands to manage your business in the future!

But, whatever you do, if you're trying to be productive, *don't* ask Alexa what's on Netflix!

Finding assistance with personal tasks

We've talked about a range of AI assistants that can help you with your work life, but what about help with life outside of work?

Online ordering, whether these are groceries or other items, saves precious time.

Amazon has *subscribe and save* options for many products that are used on a regular basis. Choose a delivery frequency, and they'll automatically arrive without you even needing to think about it. Amazon will email you before each delivery is due, and you can do nothing and let the item arrive, postpone it, or cancel it.

There's also **AmazonFresh** for ordering groceries in some regions - it does feel a little strange seeing bananas on the same site where you buy your books and laptops, but hey, it's convenient!

Amazon Prime:

<https://www.amazon.com/gp/help/customer/display.html?nodeId=201910360>

Amazon Fresh: <https://www.amazon.com/AmazonFresh>

Alternatively, if you have access to supermarkets that will deliver your groceries to you, you can set up your basket so that the contents will be saved to make it quick for you to reorder next time. Planning in advance means you can also get the most economical delivery slots!

Then there are services like **HelloFresh**. They'll send you the exact ingredients you need, along with the recipes to make healthy food at home. Cheaper than take-out, but more expensive than cooking your own store-bought ingredients, it's another option to consider.

See all the countries they operate in here:

<https://www.hellofreshgroup.com/contact-us/>

TaskRabbit is another international company that offers busy people a helping hand. They have "taskers" who can perform a range of domestic and admin tasks, or run errands for you. Available in the US and UK:

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

<https://www.taskrabbit.co.uk>

Please join me in Chapter 3, where you'll find even more ways to add time back into your day.

CHAPTER 3

Where did my day go? Goal setting, habit tracking and maintaining your focus

How often do you say to yourself?

"I just don't know where the day went!"

Sometimes, you may not feel that you have much to show for all the hours that you've been busy, however, by the end of this chapter, you'll have the tools to set yourself up for a distraction and procrastination-free day.

This chapter also includes time tracking tools for freelancers, and consultants who need to calculate the time spent on project work, and software for *anyone* that wants to clarify where those “missing” hours went!

Time and activity tracking tools

RescueTime was hailed by *PC Mag* as being the best app for time-management that they have *ever* reviewed. The software tracks the time you spend on websites, and on the applications on your computer, for a comprehensive overview of how you're *really* spending your time.

You'll receive reports that break down your activities, allowing you to make important changes to improve efficiency.

You can also use RescueTime to set alerts that trigger based on the time spent on certain activities. This means that you can *time-box* your to-do list by allocating a fixed amount of time to each task, so time never flies by unnoticed.

There's a free forever lite plan, plus a paid plan that will let you designate named websites as “no-go” areas by blocking them. The software will alert you when you achieve your goals, keeping a log of your "wins", along with more detailed reporting options.

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

You'll find links for Macs, PCs, Android and Linux here:

<https://www.rescuetime.com/features>

Chrome app: <https://www.rescuetime.com/browser-plugin>

Be Limitless is a great-looking Chrome extension into which you can input your daily tasks. However, if you regularly wonder where you're allocating most of your time online, this is where Be Limitless differentiates itself. This extension will help you find out – just check the dashboard view of your activities. Track your tasks, get weekly or monthly productivity reports and get quick access to your favourite websites using this free extension.

<http://www.testlimitless.com/>

Harvest is an online time tracking tool that will display reports online, or on your smartphone. Start the timer and track the time taken to complete tasks in real-time from a web browser, or from a mobile app if you're on the go. Use the Mac app to start a timer from your desktop, or the Chrome extension to track time from your browser. Harvest is free for 1 person tracking 2 projects, and \$12 USD (less when paid annually) for 1 person with an unlimited project allowance.

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

Here's a link to the download page for Harvest apps for Chrome, Safari, Mac, Android and iPhone:

<https://www.getharvest.com/add-ons>

Toggl has a one-click start / stop timer, making it simple to track the time spent on tasks. There is also functionality to set up teams on Toggl and to produce activity reports.

Toggl costs from \$10 USD, per user, per month on a monthly plan. You'll pay a little less if you choose an annual subscription.

<https://toggl.com/>

Android:

https://play.google.com/store/apps/details?id=com.toggl.timer&hl=en_GB

iTunes: <https://itunes.apple.com/gb/app/toggl-work-time-tracker/id885767775?mt=8>

TopTracker, is a tool best suited to freelancers who get paid for working on specific projects, or by the hour. Users can track time expended on each project and even include screenshots, or webcam images where proof of activity is required.

Reporting is included, so users can keep track of productivity.

TopTracker is available on the web and for Macs, Windows, and Linux operating systems.

Click on the link below to access the software download options, or to sign up for the web version of the software.

<https://www.toptal.com/tracker/>

Hours, is for those with iOS mobile devices.

It presents a visual timeline of the tasks you've worked on, as well as any time gaps that are unaccounted for.

Reminders can be set and activity reports can be exported in CSV or PDF format. There's a daily view, a feature that supports note taking and the option to integrate with *Freshbooks* accounting software. (Please see Section 2 of this book for software to manage your finances.)

iTunes: <https://itunes.apple.com/us/app/hours-time-tracking/id8959339566>

For a simple solution, use the stopwatch on your phone or tablet, or try using [Google stopwatch](#) as a timer to keep track of the length of time spent on your activities.

Other website blockers

We've already talked about RescueTime, but here are some other tools that will help you to stay focused, and keep you out of temptation's way if you're easily distracted!

Leechblock, is a free website blocking add-on for Firefox web browsers.

Just enter the details of the websites that distract you the most, and let the app know when to block them.

Mozilla Firefox add-on: <https://addons.mozilla.org/en-GB/firefox/addon/leechblock/>

Block Site, is a free Chrome extension that will block websites for you.

If you proceed to a site that's been blocked, you'll be shown a “blocked website” page, alternatively you can be redirected to another website instead.

<https://yourblocksite.com/>

If Facebook is your Achilles heel, then the **News Feed Eradicator for Facebook** is available to help. Your news feed will be removed, and in its place you'll receive an inspirational quote!

<http://news-feed-eradicator.west.io/>

Pro Tip!

There are opportunities for learning everywhere!

As you browse through the tools in this book and visit websites, app stores and marketplaces, take note of which tools have excellent copy that describes not just *what* the product does, but also the *result*, and the *positive change* that the customer will enjoy. Getting the right marketing copy in place to sell your products, or services is a work in progress - it's well worth regularly reviewing, updating and tweaking the text on your website and in your marketing materials to help you identify the most powerful messages to attract your audience.

Peter Drucker, the author of more than 30 business books has now sadly passed away, but he is still frequently quoted in the field of business. Here's a great quote of his:

"The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself."

Next, let's move on to *Stayfocusd*, whose marketing copy perfectly illustrates this point.

Stayfocusd boosts productivity by blocking those distracting, time-wasting websites that drag your attention away from important tasks. Once you use up your allocated time on a “bad” website - that's it - the website is blocked for the rest of the day!

The software is free from the Chrome Web Store.

<http://www.stayfocusd.com/>

Look at this marketing copy from the Stayfocusd Chrome Web Store page:

"You sit down at the computer, and you swear you'll be productive. Next thing you know, it's twelve hours later. You've checked your email, updated your Facebook status, blown through 200 pages of Reddit, read every article in your Twitter feed, looked up your favorite band on Wikipedia, vanity googled yourself, cyber-stalked your ex, browsed through all your high-school crushes' Facebook photos, and lost a week's pay playing online poker. What you haven't done is WORK."

What are your first impressions? Do you think this marketing copy is powerful?

I think it's brilliant for several reasons:

1. The highly descriptive copy will strike a chord with the people who need

it most, who will instantly recognise themselves.

2. It manages to emphasise that procrastination is quite damaging (and irrational!) *without* passing judgement.
3. It brings a good dose of humour to the situation.

Cold Turkey is a free productivity program that you can use to block distracting websites so you can get more done. This is for serious users - once you set the timer, there will be a device-wide block that will only be removed once the timer runs out.

Downloads for Windows and Macs can be found here:

<https://getcoldturkey.com/>

Google Play:

https://play.google.com/store/apps/details?id=com.felixlogic.coldturkey&hl=en_GB

Laterbox, will also help you remain focused. If you're someone who is distracted more by random thoughts about all the *other* things you need to do when you're working on a task, (rather than social media or other websites), this tool could be just what you need.

I *had* to sign up for this tool because of the way it's structured – users can set a large goal, *and* several small goals for the day. If ideas and thoughts are constantly bubbling up that are important, but not urgent, rather than get distracted by them, you can capture and prioritise them so you can calm your mind enough to return to your #1 task.

If you sign up before the current beta period ends, you can get the tool free for

life.

Laterbox is available as a web app, or a Chrome app:

<https://laterbox.co/>

These are the "problem triaging" questions that greet you when you first sign up for Laterbox (including several 21st Century addictions!) Giving the app a very personalised feel.

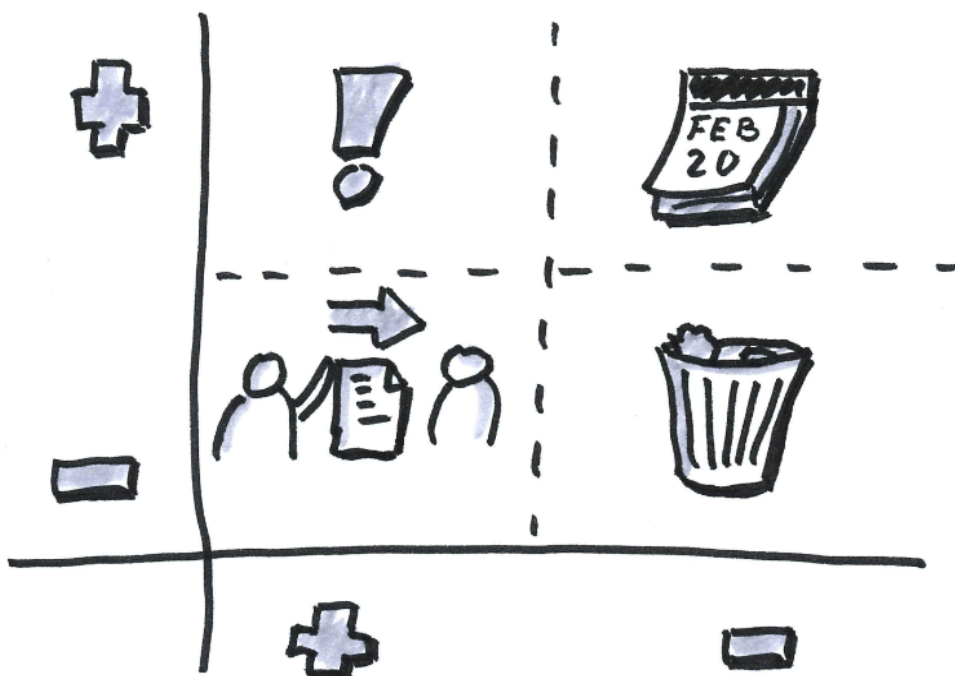
Getting strategic

Laterbox led me to think about Steven R. Covey's *Time Management Quadrant* (also known as the *Eisenhower Matrix* or *Urgent-Important Matrix*) from the book *First Things First*, because the product supports task prioritisation and focus.

The *Time Management Quadrant* categorises tasks as follows:

- Urgent and important tasks - top left
- Important, but not urgent tasks - top right
- Urgent, but not important tasks - bottom left
- Neither important, nor urgent tasks - bottom right

Credit: The Eisenhower Matrix. A common tool for time management systems. By Oliver Tacke, Wikimedia Commons: [https://commons.wikimedia.org/wiki/File:Oliver_Tacke_-_Eisenhower-Matrix_auf_Flickr_-_CC_\(BY\).png](https://commons.wikimedia.org/wiki/File:Oliver_Tacke_-_Eisenhower-Matrix_auf_Flickr_-_CC_(BY).png)



Laterbox allows you to place priority tasks at the centre of your focus, including tasks that will help you achieve bigger, more strategic goals, which are usually important, but not urgent.

The *important, but not urgent* quadrant is where the magic happens. It is in this quadrant where a person is said to be working "on" their business and not "in" it, because this is where time is spent on planning, strategy, and working towards fulfilling a medium, or long term vision, and not on day-to-day minutiae that often draw attention away from time for review and reflection, and asking those big, important questions.

Within the software there is also space to note down medium and small tasks. Anything else can be put into the Laterbox. These items can then be prioritised and either upgraded to priority tasks, deleted, or delegated where possible. (If

tasks are neither urgent, nor important, then there are more worthwhile things that you could be doing, and you should drop them!)

Goal-setting and habit tracking

Habit tracking and goal setting software can be used to establish new behavioural patterns. Common pop-psychology (and Google) will tell you it takes 21 days to change a habit, but a 2009 study showed that it can take between 18 and 254 days, with an average time of 66 days for a new habit to become automatic.¹

Here are some tools that will help you to break old habits, and form new ones!

Strides is a habit and goal tracking app that can be downloaded, used on the web, or downloaded for free from the iTunes Store.

There are charts, statistics and a count of how many days in a row you've maintained your habit, or worked towards your goal.

<http://www.stridesapp.com/>

iTunes: <https://itunes.apple.com/us/app/strides-habit-tracker-for-daily-life-goals/id672401817?mt=8>

The Way of Life app, will help you to track your habits. Take a few moments each day to update the app, and soon you'll be able to look at graphs of your activity, identify trends and take steps towards positive change.

Reminders can be set up daily, for weekdays, or weekends only, and with, or without an alarm. You can track a limited number of habits for free.

<http://wayoflifeapp.com/>

iTunes: <https://itunes.apple.com/us/app/way-life-ultimate-habit-maker/id393159800?mt=8&ign-mpt=uo%3D4>

Google Play: <https://play.google.com/store/apps/details?id=com.wayoflife.app>

Momentum (Momentum Dashboard) is a habit and goal tracking application for the Google Chrome browser that has accumulated some faithful fans.

This visually stunning app displays a daily inspirational quote (today's is: *"If you change nothing, nothing will change."*), and a beautiful image as a backdrop, along with a to-do list and your major goal for the day.

Momentum is available on iPhone, Apple Watch, Mac and Chrome. The app and daily goal and to-do list are free to use, but you'll need to pay to access additional features such as weather reports, the freedom to choose your daily image, and integration with other software, including Asana, Todoist, Trello, Google Tasks, Fitbit Steps, and more.

Momentum Plus costs \$2.50 USD per month, paid annually in advance, or \$4.95 per month billed monthly.

<https://momentumdash.com>

Did you manage to write in your journal, or note down your targets for the day?
Did you exercise? How about getting that coveted 8 hours of sleep a night?

AskMeEvery's tagline is *Simple, Daily Accountability*.

Set yourself a challenge – type a question into the AskMeEvery system, and every day you'll receive an email which asks you that question. When you answer your daily question, the software will record your response. You can set yourself a maximum of 3 questions each day on the free plan, with more questions sent via email, or SMS if you take the \$2 per month paid plan. Try it with your worst habits - just knowing that you're going to be asked to record your activities makes you more conscious of the things you know you *should* be doing!

The software transforms your responses into bar charts, so you can easily spot any patterns in your behaviour.

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

If you want a simple browser-based option, try **Don't Break the Chain**.

To use it, sign up for an account, pick a goal, mark off the days on the calendar when you hit the goal and *don't break the chain!*

<http://dontbreakthechain.com>

You may have come to realise that you're more motivated by *avoiding punishment*, or negative consequences than moving *towards pleasure*, known as having a *direction of motivation* which is orientated "away from" the negative, rather than "towards" the positive in the field of NLP. (Also known as being more motivated by the "stick", than the "carrot" in layperson's terms!)

If you think that public awareness of your goals, or even a financial penalty may get you moving, then try **Stickk**. You'll sign a *Commitment Contract* and can involve friends or loved ones, so they can cheer you on.

You can raise the stakes by agreeing to forfeit a set amount of money if you *don't* achieve your goal - a decision that will make you three times more likely to succeed, according to the Stickk website.

<https://www.stickk.com>

Try the KSS log!

The KSS log is a very simple, but powerful continuous improvement tool. Get the KSS log here: <http://bit.ly/EE-KSSLOG>

In the next chapter, we'll review a range of tools and techniques for improving focus and concentration.

References

How are habits formed: Modelling habit formation in the real world.¹

Phillippa Lally, Cornelia H. M. van Jaarsveld, Henry W. W. Potts, Jane Wardle.

<http://onlinelibrary.wiley.com/doi/10.1002/ejsp.674/abstract;jsessionid=E1BA6939DF963541474A3E57470DFFA0.f04t03>

*****END OF SAMPLE*****

You can access the full version of Entrepreneurial Espresso here:

<http://mybook.to/entrepreneurs-save-time>.

SECTION 4

**Don't Hire a Software Developer Until You
Read this Book™ (SAMPLE: Chapters 1-4)**

DON'T HIRE A SOFTWARE DEVELOPER UNTIL YOU READ THIS BOOK

**FROM IDEA TO LAUNCH: A SURVIVAL
GUIDE FOR NON-TECHNICAL
ENTREPRENEURS, SMALL BUSINESSES &
STARTUPS.**

**LEARN HOW TO MANAGE THE SOFTWARE
DEVELOPMENT PROCESS & TRANSFORM
YOUR MOBILE APP OR SAAS CONCEPT
INTO A COMMERCIAL PRODUCT.**

K.N. KUKOYI

DON'T HIRE A SOFTWARE DEVELOPER UNTIL YOU READ THIS BOOK.™ (SAMPLE)

From idea to launch: a survival guide for non-technical entrepreneurs, small businesses & startups. Learn how to manage the software creation process & transform your mobile app or SaaS concept into a commercial product.

Now an Amazon **international best seller** in multiple book categories in the US, UK, Canada, Germany, Brazil and Australia.

**Author
K.N. Kukoyi**

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Don't hire a software developer until you read this book.TM (SAMPLE)

From idea to launch: a survival guide for non-technical entrepreneurs, small businesses & startups. Learn how to manage the software creation process & transform your mobile app or SaaS concept into a commercial product.

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FREE RESOURCES

There are many downloadable resources that come free with this book. Here's the full list and links to where you can find them:

- **Free resource 1:** *Chapter challenges workbook*. A summary of all the challenges that appear in this book. Note down the actions you wish to take and set yourself due-dates to complete them!
<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/Free-resource-1>
- **Free resource 2:** *10 x Trello boards*, for you to copy and use, including boards to help you manage the build of your project, project management boards, a road map board, customer service boards and task prioritisation boards – just choose the ones you want.
<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/free-resource-2-trello-boards>
- **Free resource 3:** *My personal version of the PMI Log which is great for reviewing information, organising your thoughts and making decisions*.
<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/Free-resource-3-pmi-log>
- **Free resource 4:** *NFR checklist*. Very important when building professional apps!
<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/free-resource-4-nfr-checklist>
- **Free resource 5:** *Customer profile template*.
<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/5-customer-profile-avatar>
- **Free resource 6:** *Sample job advert for back-end / full-stack developer with crib notes*.
<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/resource-6-sample-job-advert>
- **Free resource 7:** *Developer Interview Log* to help you keep track of your interviews.
<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/resource-7-interview-log>

- **Free resource 8:** *Issue log for the beta launch of your MVP.*
<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/resource-8-issue-log-for-beta>
- **FREE GIFT:** 2 x bonus chapters: 1. *Presales and raising funds for your business* and 2. *A brief time out.*
<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/free-gift-2x-free-chapters>

HOW TO USE THIS BOOK

You will come across the following conventions within this book:

Chapter summaries. The start of each chapter contains a preview of what's to come in bullet-point form, so you can zoom in on key areas of interest.

Chapter challenges. At the end of some chapters, there are challenges. They are tasks that will help you make progress towards specific goals in your product's development. If a chapter includes a challenge, this will be highlighted in the summary at the start of the chapter.

Free resources. These are available in some chapters for your convenience and may include *scripts, templates and other documents* that you can download, or copy to save time. If a chapter includes free resources, this will be highlighted in the chapter summary. Please see the *Free Resources* pages at the start and end of the book for the full list.

Boxed text represents a *professional ("pro") tip, project pitfall* or *general tip* or warning. These occur throughout the book to highlight important points.

Italics are used to identify business or technical concepts, terms, products, tools and company names. If you're doing research and need facts on specific technical topics, you'll find much better quality information if you search using the correct "techie" terminology. The IT community usually write to communicate to others *within* the industry and use industry-standard words and phrases, so knowing the jargon will really help. The way you communicate has the potential to save you a *lot* of frustration and wasted time...and time is money when you're developing software! It will become easier and quicker to communicate with a developer when you speak a common language.

Exercises. Some chapters contain exercises for you to complete. Some will involve web research, and others sitting down with a pen and paper! If it's not a convenient time for you, you may wish to bookmark exercises so you can come back to them when it suits you.

Naming conventions for different types of app. Many types of app exist, so when "apps" or "products" are mentioned in this book, this is a reference to software applications in general, otherwise I will specifically refer to *mobile apps*

and *web apps* and occasionally to *desktop apps*. Many of the tips, tools, processes and techniques contained within this book are universal, and will be relevant regardless of the type of app that you wish to build.

Links. Many chapters contain links to tools, resources, and products to assist you in managing your project or delivering your software. Most the tools listed in this book are free or low-cost, as I appreciate that you may be on a tight budget. There are also links to sources of information such as legal websites, business resources and guides for mobile app development.

Examples and case studies also exist within this book. Where present, they are highlighted in the relevant chapter summaries.

Chapters and sections

The 25 chapters of this book have been grouped into sections, beginning with starting your business, through to your first product release.

You do not need to read this book in order. However, if you are new to these topics or are starting a business for the first time, this may be useful to ensure you don't miss out on key points, chapter challenges or exercises along the way. If you are reading the book out of sequence, please be aware that you may "jump in" at a point where specific topics have already been discussed. I recommend using your Kindle device or Kindle reader app to run keyword searches on topics of interest, and italicised keywords, so you have easy access to all the information available.

To assist readers who are dipping in and out of the book, I refer to both previous and forthcoming chapters to identify related topics that were mentioned earlier in the book, and related topics still to come.

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INTRODUCTION

“Everyone can tell you the risk. An entrepreneur can see the reward.”

- Robert Kiyosaki

This book tells a story.

It’s the story of an idea. Your idea, and its transformation into a tangible product.

It’s a story about starting, or expanding your business based on that product, and bringing a commercial software application to market. It’s about the world of software delivery and how it works; the “big picture” and the small but critical details, its cycles and working practices, and making good software development decisions in order to achieve your goals.

It is a story about you, an entrepreneur with a technical job to do!

There is no question that software development is a complex activity, but you'll find it far easier to manage the process with a survival guide to assist you and show you how to get started.

You will discover more about what’s involved in building and launching a web or mobile app, whether you’ve started building your product, or are considering your options.

There are more types of app, or “application” than you might expect, and we’ll review this, as well as considering the wider trends in software, strategies, tactics, and data to help you make informed, strategic decisions about the options available and the software that is best for your business, and your customers.

If you’ve already hired a developer, it’s not too late! You’ll find plenty of information about how to avoid mistakes and unnecessary issues as your software is developed. You will be shown techniques and processes to help you successfully manage your project, and you’ll discover how to build a productive working relationship with the person, or people responsible for building your product.

* * *

What else will you learn?

You will expand your knowledge in some areas and discover many “unknown unknowns” in others!

You don't know what you don't know, as the saying goes. Would you agree that the things we *aren't* aware of often cause us the most difficulties?

It's impossible to prepare for situations you can't see coming. However, in software development there are challenges which are very likely to arise on *every project*.

Wouldn't it be nice to get a heads-up right now to find out what they are, and how to deal with them?

There are also those queries that you already know you need answers to. You may be asking yourself questions such as:

“What contractual agreements should I have in place?”

“How should I go about interviewing and selecting a developer?”

“How often should I pay them?”

“What if I'm unhappy with the product that's delivered to me?”

“How will I keep a software project on track if I don't know how to code?”

You'll receive answers to all these questions and more! There are many important topics for us to cover, so let's get specific, so you can see *exactly* what benefits you'll get from reading this book:

You will learn about product development and software delivery, but in addition to that, we'll cover other subjects that will contribute to your progress and success. These include the **practicalities of starting a business, company formation, freelancer and confidentiality agreements and legal and Intellectual Property considerations**. (Chapter 1.)

Following this, we'll move on to **market and consumer research and interviewing your target customers, assessing different types of app and**

income generation strategies, creating prototypes and considering user experience (UX) and running user testing sessions, so you can be confident that your product is going to be a hit. (Chapters 2, 3 and 7, 8 and 10-13.)

Next, we'll look at **ways of finding developers with the skills you need at a price that suits your budget**, (Chapters 15-17) and **how to communicate with your developer** in ways that will help you get your product built more quickly and with less confusion and wasted resources. (Chapters 10, 14, 19, 21 and 22.) We'll also talk about **Agile development roles and principles**, and how to make them work for you. (Chapters 4, 5 and 22.)

Building high-quality software will be critical to the success of your product, so we'll review the **measures that software professionals** take when building software and preparing it for release to customers, (Chapters 5, 6 and 21) and you'll learn how to test for defects. The essentials of **project management, avoiding project pitfalls that will waste your time and money**, and the **practicalities of managing the development of your software** will also be covered in detail. (Chapters 14, 18-23.)

The **launch of your product** will be an important and exciting time, but at this time it will also be important to think about **setting up simple, but effective customer care processes**.

Once you have your product you'll need to promote and sell it, so **basic marketing and sales** will be covered too; both online and in the app marketplaces. (Chapters 9, 24 and 25.) All the necessary activities will be explained and broken down into practical steps that you can follow.

Throughout the book, I'll share **insights** and **professional tips** to help you avoid the mistakes and perils that you may be unaware of if you're new to this topic, and we'll cover the "techie" and commercial subjects needed to manage your venture. There are also **hundreds of links to free, and low-cost tools and resources** perfect for entrepreneurs starting software ventures and building their businesses. You'll also be given access to 8 free documents that you can download to save yourself time.

There is a *lot* of information in this book! Including such a wide range of information and topics has made it more challenging to write, but this is also where the value lies.

*After reading this book, you'll understand **what** you need to do, **why** it's important to do it, **how** to do it and **when** to do it, with no mystery, or guesswork*

involved. The **tools** you'll need are also provided, and you can get started with this one book, instead of having to begin by reading ten!

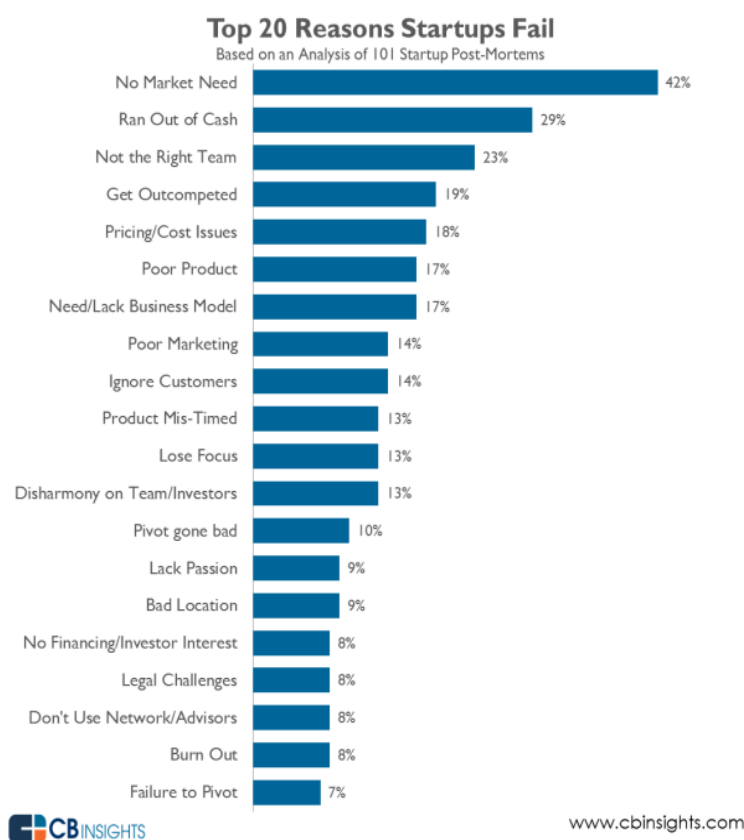
This is *your* software survival handbook and you will be able to tap into the specific information you need, based on the stage you're at.

* * *

From speaking to entrepreneurs like you, I know you want to get positive results and to avoid making mistakes wherever possible. CB Insights, a tech market intelligence platform, ran a “post-mortem” analysis on the failure of 101 startups based on feedback from the founders,

<https://www.cbinsights.com/blog/startup-failure-reasons-top/>

Fig 1. Source: CB Insights - Top 20 Reasons Startups fail



This book addresses a number of the common reasons for failure provided by the founders that were interviewed, including the top 9 items in the reasons for failure table. It will also help you:

- **To increase your knowledge, and reduce the risks involved in starting your tech business.** *Hiring a developer, or agency to build your app, and then "leaving them to get on with it" is a common rookie mistake.* Your product will be evolving on a daily basis, and your input will be needed, so you should be checking-in with the builder of your app to see that the plans you agreed have not gone off track! You will be travelling along a bumpy road without adequate knowledge about the things you'll need to *know, ask, and do* to make your venture a success.
- **To increase your confidence.** This book provides information on the warts-and-all of software development. Having a better understanding of the processes involved in building software will reduce your reliance on the people you hire, who may, or may not be helpful in giving you the right information, or providing guidance as you start your software creation journey.
- **To get easy access to the information you'll need.** Traditional technical textbooks are written for professionals already in the industry. They require a level of existing knowledge and have a narrow focus. They don't cater for the needs of entrepreneurs and startups who need a breadth of skills and knowledge across multiple topics to cover all the bases. They are also likely to assume that your software will be built with the assistance of a full software delivery team.

This book can be used even if you *don't* have the luxury of a large team to assist you and requires no pre-existing knowledge. You'll be provided with all the information you need to get started and to progress right through to product launch. Regardless of the size of your team, or your resources, I'll show you how you can benefit from having a well-managed development project.

* * *

In case you were wondering, this isn't theoretical knowledge!

I know how rewarding it is to make the journey from idea to working software and this is something that I have done repeatedly since 2004. Working as an IT Consultant I have delivered commercial-grade software for clients ranging from small businesses to multinational corporations, used by people all over the world, and have led and worked within numerous Agile software delivery teams.

My experience spans across business, as well as “tech” and covers: business analysis, strategy, product development, testing and software quality, project management, market research, customer care and the translation of ideas into technical requirements, and this is what I’ll be sharing with you!
If you’d like to know more, please see the *About the Author* page.

Visit the Free Resources page to pick up the documents, tools, scripts and tables that come free with this book to help you with your venture. I’d love to hear about your experiences. You can reach me with any questions at:
<http://www.purposefulgroup.com/contact-us.html>.

If you’re interested in building a software application to sell, or would like a professional opinion before investing in buying new software, you can book a FREE 30 minute consultation session here: <https://calendly.com/purposeful-products>.

Good luck!

SECTION 1

YOUR BUSINESS, YOUR IDEA & YOUR CUSTOMERS

CHAPTER 1

Protecting your interests

In this chapter:

- Software and Intellectual Property
- Freelancer employment contracts
- Contracts and non-disclosure agreements
- Trademarks
- Choosing a legal status for your company
- Insuring your business
- Accounting, budgeting and keeping financial records
- Finding an accountant
- A brief word about VAT

If you're already familiar with Intellectual Property and the legal aspects of dealing with freelancers, please continue on to Chapter 2. If not, let's discuss these fundamentals.

PLEASE NOTE: Most the topics in this book are international, however, laws and procedures may differ according to your state, or country of residence. Please contact the equivalent bodies in your own country and when seeking professional advice, always use the services of lawyers and chartered or certified accountants authorised and qualified to practice in your country.

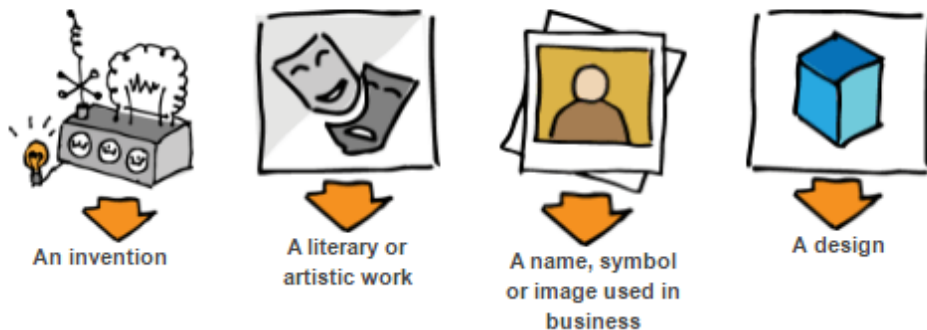
Intellectual Property

In order to protect your interests, you'll need to know about Intellectual Property (IP).

IP is an umbrella term which covers copyrights, patents, designs, trademarks and the laws and codes of practice related to them.

Fig 2. Types of IP. Source: The Intellectual Property Office (IPO)

Intellectual Property (IP) concerns creations of the mind. IP can be:



The Intellectual Property Office (IPO) is the government body responsible for intellectual property rights in the UK. It's well worth contacting the IPO (or its equivalent in your own country) for some free advice. However, you may still need to seek advice from a solicitor. Their familiarity with relevant trademark case law, recent disputes and an understanding of how these might relate to your individual case will be important, so if you hire a law firm, confirm that they are *specialists* in IP.

Copyright and other sources of information

Software is *usually* protected under *copyright law*. The information below, provided by the IPO, provides one example where software is considered to be a *copyright* matter and when it may require a *patent*.

Fig 3. Patents and computer programs. Source: The Intellectual Property Office (IPO)

<http://www.ipo.gov.uk/blogs/iptutor/stem-patents-and-trade-secrets-part-1/>

Patents and computer programs

Computer programs are normally protected by copyright although patents are available in the UK for the majority of inventions that involve computer programs.

For example, a washing machine run by a software program to use less water and at lower temperatures would be patentable, whereas general application programs such as word processing software or an app for a smartphone may not be patentable. Therefore, it is important to get legal advice on patent applications in this technical area.

Don't forget that other forms of intellectual property rights can be important in protecting your innovation – for example, protecting the trade mark used for the app you have developed.

This page from the IPO contains an IP overview, as well as links to specific IP topics: <https://www.gov.uk/government/organisations/intellectual-property-office>

The IPO have produced a short video called “What’s intellectual property got to do with me?” You can access it here: <https://youtu.be/PMab4oRGaZc>. It’s just over 1 minute long and packs in a lot of information which is relevant regardless of your location.

Freelance employment contracts

Having a solid contractual agreement in place is a sensible idea for several reasons:

- It’s a legal document that both parties must take seriously.
- It’s a reference in case of disputes.
- Things run more smoothly when everyone knows where they stand!

Your contractual agreement should clearly state what the person or company you hire will do and what happens if either party fails to fulfil their contractual obligations.

Here are some clauses you may wish to cover in an agreement:

A clear description of the work to be done. Describe what you are hiring the developer to do, for example: “Develop a Social Media mobile app for Android devices, including all tasks associated with the build of the app and its launch,

which should follow good industry practice and be delivered to a professional standard.”

Obligations. Whether you hire an individual or an agency to take responsibility for the build of your product, you should include any obligations that you expect them to fulfil. Obligations might include agreeing to behave in an honest manner, to follow your instructions and to work with reasonable care and skill. Include your obligations to the developer too. An example might be to make payments on a certain day each week, or to pay an agreed number of days after your project (or a milestone within it) has been delivered to your satisfaction.

Working hours. Do you want to agree on specific days of the week which will be worked? Will working hours be fixed, or flexible? Should there be a minimum or maximum number of hours to be worked each week?

Payment cycles. Are you going to pay daily, weekly, monthly, or per project on a fixed fee basis? Will you pay an hourly rate, or would you consider staged payments based on reaching specific project milestones? If staged payments are to be made, you might agree to split the development work into segments and pay based on the successful completion of each one. This may benefit both parties; your developer knows when they should be getting paid and you are assured of progress before you make payment. If you agree to use milestones, you’ll need to list the work to be delivered for each one to avoid future disputes (or confusion) about what was to be included or excluded at each stage.

Time sheets and invoicing. When should time sheets or invoices be submitted to you for payment, and in what format? (We’ll talk about tools for logging the hours worked by your developer using *time tracking tools* in chapter 16.)

Termination and Serving notice. What are the terms (or scenarios) under which either party can end the agreement? How must this be done and how much notice is needed? Under what circumstances would you wish to end the contract immediately? Would you like your agreement to include a probationary period?

Intellectual property rights. Once you know all the types of Intellectual Property that you have within your business, then you will better understand the points that you will need to cover in your contract. Employers often write into their contracts that all IP generated whilst working for their company belongs to them exclusively. You will want to protect your *idea*, and be recognised as the owner of your product’s *source code* and *any other IP linked with your venture*.

Confidentiality / Non-disclosure. This is a requirement to keep any material, knowledge, processes or information confidential. Please refer to the section about *Non-Disclosure Agreements* covered in the next section.

Restrictions on either party. Are there any restrictions that need to be put in place? If so, it should be clear what these are and when they apply. Examples of restrictions may include stating that an employee cannot set up and compete with your company in the same market after working for you, or that they may not approach your clients. Seek legal advice regarding which restrictions would be considered “reasonable” and legally enforceable.

Absence. Make it clear how your developer should give you notice of any absence they wish to take from the project and decide how you would like to be notified if your developer is unwell or has a personal emergency and is unable to work.

Expenses. Will expenses be allowed? If so, what type(s)?

Final deliverables. At the end of the project, (or whenever you and your developer agree to part ways), there will be some final deliverables that you should receive and be given access to. These may include *source code, designs, and digital assets* (such as *logos and images, files, databases and data*) and any *user names, passwords and access codes* that your developer holds.

Insurance. Business insurance is discussed later in this chapter, however it's important to be aware that freelancer contracts often state that the freelancer must have *their own* insurance cover and that a copy of their policy is provided as evidence *before* they start work. It will be useful to have these details available should an issue arise that would require some form of insurance claim.

Warranties and promises

A good contract should also include a clause in which your developer agrees that the software they will provide for you does not infringe the Intellectual Property Rights (IPR) of any other parties. In other words, you are asking them to confirm that the code they have written has not been copied in whole, or part from code owned by another individual, group, or business! The risk here is that if this is not the case, you could face a legal challenge from the original owners, and could lose the right to use and sell your own software.

The use of Open Source software has its own rules and we will talk more about this in chapter 15.

Legal documents and services

Non-disclosure agreements (NDAs)

Before you discuss your idea, make any verbal or written agreements, or hire anyone to join your project, **make sure you know where you stand in terms of Intellectual Property**. The IPO offers this advice:

Fig 4. Discussing your invention. Keeping Schtum! Source, The Intellectual Property Office (IPO)



If you have previously revealed your invention publicly in any way, you cannot patent it.

However, this does not mean that inventions cannot be discussed before a patent application is made.

There may be people you will need to discuss your invention, with such as:

- the development team
- an investor
- an IP professional (such as a Patent Attorney)

Before you discuss the details all parties should sign a 'Non-Disclosure Agreement' which can help to protect the secrecy of your invention.

You do not need a Patent Attorney to sign a **non-disclosure agreement** as they are subject to legal privilege.

NDAs (also described as secrecy or confidentiality agreements) are legal contracts which give you grounds to take action in court against those who break their terms. They can also be used if you want to share your idea in order to get feedback, but wish to keep information about your company and its plans confidential. The entrepreneurial community is divided about NDAs – some believe ideas are worthless and it is the *execution* of the idea that matters, whilst others believe that ideas can be valuable. You will need to decide where you stand on this matter and what you will do if people refuse to sign.

Will you work with them, or choose to walk away?

There are a number of places online where you can access legal documents.

SEQ Legal offer a selection of free and pay-as-you-go legal documents for IT, Internet and Business Law, including documents for those creating mobile apps, NDAs, SaaS agreements, software license agreements and more:
<http://www.seqlegal.com/>.

Contractstandards.com, offers “standardized contracts, checklists, and clauses built with analysis of thousands of public documents” and has a software development agreement that you can review: <https://www.contractstandards.com>.

If you're UK based, *Lawbite* offers access to a range of legal documents on a pay-as-you-go basis for a one off cost of £99 + VAT including e-signing facilities and two free fifteen minute legal advice sessions, <https://www.lawbite.co.uk> and *Rocket Lawyer* charges £25 a month for access to legal documents and the ability to ask questions; <https://www.rocketlawyer.co.uk/>. All prices are subject to change. You can also take a look at the business documents under the Popular Documents section here: <https://www.rocketlawyer.com/legal-documents-forms.rtf/>.

Docracy describes itself as “The web’s only open collection of legal contracts and the best way to negotiate and sign documents online” and has contracts and agreements for hiring developers and designers, which you can find here: <http://www.docracy.com/4754/contract-for-mobile-application-development-services>,

<http://www.docracy.com/2817/standard-agreement-for-design-services-interactive-web-works-full-assignment>. Sadly Docracy has announced that they are closing down, but you will be able to access its resources until then.

The UK Government’s gov.uk website has several versions of NDA available to view and download at: <https://www.gov.uk/government/publications/non-disclosure-agreements>.

Other sources of legal documents and resources are *Clickdocs* (UK), <https://www.clickdocs.co.uk/> and *Legaltemplates.net* (US), <https://legaltemplates.net/legal-documents-forms/>.

A few words of caution about contracts:

These links have been provided for your convenience.

If in doubt, please seek legal advice to ensure that your contract includes all the necessary clauses and caveats and is suitable for your specific situation.

You may also wish to seek advice to find out how an NDA might be enforced if you and your developer are not based in the same country. In this case, you may need to confirm whether the laws of your home country can be made applicable to people living and working elsewhere.

There are software agreements, website terms and conditions and other legal resources available in chapter 6. Look for the section *Legal and compliance related requirements*.

Trademarks

A *trademark* is defined as a design, graphic, logo, symbol, word or phrase or any combination of these used to identify your business or product. If your trademark application is approved, this will allow you to use the registered trademark symbol, ®.

A list of trademark specialists can be found on *The Institute of Trade Mark Attorneys* website: <http://www.itma.org.uk/members/>.

To see whether the company, product or brand name(s) you have in mind have already been trademarked, check the database of existing names and keywords here: <https://www.ipa.gov.uk/tmtext.htm>. Companies House has a page to help you check whether the limited company name you want has already been taken - you cannot pick a name that has already been claimed. You can find it here: <http://wck2.companieshouse.gov.uk/wcframe?name=accessCompanyInfo>.

If you haven't got a name for your business or product yet, there's a thought-provoking process outlined here: <http://www.nickkolenda.com/naming-process/>. Do a search on the page for the words *table of contents*, which will show you the process broken down into sections.

Choosing a legal status for your company

There are a number of "business structures" or "legal statuses" you can choose, including *limited company*, *sole trader*, *partnership*, and *social enterprise*:

A *limited company structure* "limits" your personal liability because the company is a legal entity - your finances and the company's finances are separate. This protects personal assets such as your home, car or other personal property in the face of legal action or bankruptcy, (although it's still essential to have the right insurance cover in place.)

A *sole trader's* assets *aren't* protected in this way - the individual and the business are not separate legal entities.

The Director(s) of limited companies are obliged by law to submit or “file” *annual returns* and *annual accounts* (replaced by *confirmation statements* as of June 2016) to Companies House; the UK body that forms and dissolves limited companies and registers and manages their data. As a limited company, you face fines and other penalties if you or your accountant do not file the required paperwork on time. Sole traders do not need to perform these tasks.

For more information about director's responsibilities, visit:

<https://www.gov.uk/running-a-limited-company/directors-responsibilities> and <https://www.gov.uk/running-a-limited-company/company-annual-return>.

Overall, limited companies have more paperwork and legal obligations to fulfil. It may be for these reasons that limited companies may be seen as more professional - they are subject to more “checks and balances.”

Partnerships and *Limited Liability Partnerships*. These businesses consist of two or more individuals sharing profits, management and legal responsibilities.

Social enterprises are set up to help people or communities and can register as sole traders, limited companies, partnerships, charities, co-operatives or CICs (Community Interest Companies) if the necessary criteria are met. Visit <http://www.socialenterprise.org.uk/> for more information.

If you are in the US, there is information about setting up a business here: <https://www.irs.gov/businesses/small-businesses-self-employed/starting-a-business>.

Registering your business with the correct organisations

Both sole trader and limited companies must contact *HMRC* (Her Majesty's Revenue and Customs) and register for *Self-Assessment*; HMRC's process for collecting taxes from the self-employed. *Self-Assessment tax returns* can be completed online or on paper. You'll be given more time to complete yours if you choose the online option. There's a time limit for registration, based on when you started your business. The link below explains how to calculate your *registration deadline*: <https://www.gov.uk/set-up-sole-trader/register>. Don't get on the wrong side of the tax man, confirm your deadline and avoid issues!

If you wish to form a limited company, you can approach Companies House directly via the Gov.uk website: <https://www.gov.uk/register-a-company-online> and register your company and its name. The current fee is £12.

Alternatively, you could pay a *company formation agent* anything from around £15 - £150 to set the company up for you. Gov.uk lists a number of formation agents on its website - using one of these may be a better plan than trawling the web: <http://bit.ly/1OtJe2p>.

Additional sources of information

HMRC offers information at: <https://www.gov.uk/government/news/webinars-emails-and-videos-if-youre-self-employed> which includes dates of forthcoming webinars on record keeping and filing tax returns, links to advice based videos on YouTube, plus email services and several e-learning guides. There's a Self-Assessment tax guide here:

http://www.hmrc.gov.uk/courses/SYOB3/syob_3/html/syob_3_menu.html and a guide to business expenses here:

http://www.hmrc.gov.uk/courses/SYOB3/syob_3_exps/html/syob_3_exps_menu.html

Business insurance

There are a range of insurance policies you can take out to protect your business against legal action and claims for damages.

Costs will vary depending on factors such as your age, location and the nature of your business.

Levels of cover range from around £500,000 into the millions, depending on the size of your enterprise, the level of risk you're exposed to, and the amount of cover you require. Let's look at a few examples:

Business contents insurance. Don't assume that your home insurance policy will cover business items, such as expensive computer or home office equipment. Check with your home insurer to make sure you're covered.

Public liability insurance covers you and your business for compensation claims and legal expenses in the event that a customer or member of the public makes a claim against you for property damage, personal loss or injury.

Employer's liability insurance protects your employees and covers you against damages if a claim is made against you by an employee. Employer's liability insurance is required by law if you hire staff, however, this may not be required if the worker:

- Is based in a different country, or is in the same country, but does not work in your office
- Uses their own equipment
- Has their own insurance
- Does not have a long-term contract
- Is not directly supervised by you

Professional indemnity insurance cover will help you defend claims relating to inadequate advice, negligence or errors and the cost of rectifying mistakes, including legal costs, compensation and expenses.

Cyber insurance is an important consideration for all businesses, and covers risks related to the Internet, Information Technology and “electronic” business activities. We’ve all heard about companies that have been hacked and had email addresses, passwords and personal data stolen which hackers may then use to try to access other accounts.

When shopping for insurance, ask whether cyber insurance is available as a standalone, or add-on policy. Policies might include coverage for:

- **Hacks and data breaches**, where security is breached and data is stolen, customers and government departments, or regulators will need to be notified, and support may need to be offered to customers. Policies may cover investigations and penalties.
- **Copyright infringement**. This may include protection against infringement of copyright, or protection against defamation of 3rd parties in electronic communications, such as in emails.
- **Claims from injured parties**. There may be a need for legal advice and defence if claims are made for failing to keep customers’ personal data secure.
- **Business interruption**. Because loss of data can bring a business to a standstill, affected businesses may experience a loss of income.
- **Restoration and the repair of damage** to websites, programs and data.

- **Ransom of data**, where hackers may attempt to demand money in exchange for the return of your data, this type of coverage may allow you to claim back any ransom money that has been paid.
- **PR, crisis and reputation management.** Where a business loses data, or where it is stolen, this can damage its brand and reduce trust in the business. Reputation management and PR services can help an affected business to address the damage to its reputation.

Here are some UK and US government resources to help you protect your business, and keep customers' data safe.

- Cyberaware (Cyber streetwise) was set up by the UK government. Their advice on protecting your business can be found here:
<https://www.cyberaware.gov.uk/protect-your-business>
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/273330/cyber_streetwise_open_for_business.pdf
- Cyber Security Guidance for Businesses. This page includes training, ways to obtain security certification for your business, and advice on guarding against fraud: <https://www.gov.uk/government/collections/cyber-security-guidance-for-business>
- The National Cyber Security Alliance (NCSA) has a website, Stay Safe Online, which offers advice to US-based businesses: <https://staysafeonline.org/businss-safe-online/assess-your-risk/>.
- The ICO (Information Commissioner's Office) in the UK has produced a practical guide on IT security for businesses, which you can access here: https://ico.org.uk/media/for-organisations/documents/1575/it_security_practical_guide.pdf

Selecting a reputable insurance company

Insurance “supermarkets” such as Compare The Market, Go Compare, Simply Business, and Confused.com are some of the larger online price and quote comparison sites for business insurance:

- <https://www.comparethemarket.com>
- <http://www.gocompare.com/>,
- <http://simplybusiness.co.uk/insurance> and
- <http://www.confused.com/>

Axa, Hiscox and Direct Line for Business are some of the big names in the general insurance market:

- <https://us.axa.com/small-business/> (US)
- <http://www.axa.co.uk/insurance/business> (UK)
- <http://www.hiscox.com/small-business-insurance/> (US)
- <https://www.hiscox.co.uk/business-insurance/> (UK) and
- <https://www.directlineforbusiness.co.uk/> (UK)

Policy inclusions and exclusions can vary significantly between companies. Read the small print carefully and request clarification where necessary, before signing up!

Accounting, budgeting and keeping financial records

It's a good idea to keep a log that you can continually update as you learn more about the running costs associated with building, owning and maintaining a software application. You can use this to create a rough budget for the initial project to get your app built, and for running it on a monthly basis thereafter. After your initial product is developed, you may wish to enhance, or add new functionality to it on an ongoing basis, so keep that in mind when budgeting.

Log any one-off, monthly and annual costs, and any other expenses that arise. There is information about project costs and ongoing expenses related to app ownership in chapter 21.

Keeping financial records

Make sure you claim the cost of hiring staff and other allowable businesses expenses. Keep your receipts, invoices and bank statements as evidence of your business transactions and for your self-assessment tax returns and pass copies to your accountant, if you plan to use one.

In the UK, financial records must be kept for a period of six years.

Bookkeeping, (financial record keeping), will help you keep track of all your receipts and expenses. This can be done using spreadsheets, mobile apps or accountancy software such as *Xero*, <https://www.xero.com/uk/> or *Freshbooks*, <https://www.freshbooks.com>. You can do your own bookkeeping, or hire a bookkeeper or accountant to help you.

You can confirm which expenses you may claim via your accountant, HMRC or the Gov.uk website. Here is a list of common business expenses that you can claim for if you go down the self-employment / sole-trader route; <https://www.gov.uk/expenses-if-youre-self-employed/overview>.

According to the Gov.uk website, the major categories of expenses you can claim for include:

- Office costs, e.g. stationery or phone bills. You may also be able to claim some expenses if you work from home.
- Travel costs, e.g. fuel, parking, train or bus fares.
- Staff costs, e.g. salaries or subcontractor costs.
- Financial costs, e.g. insurance, accountant's fees and bank charges.
- Costs of your business premises, e.g. heating, lighting and business rates.
- Advertising or marketing expenses, e.g. costs related to running your website and online advertising.

Expenses for limited companies work differently and you can find out more about the accounting process for limited companies and the expenses that can be claimed here:

<https://www.gov.uk/running-a-limited-company/company-and-accounting-records>.

<https://www.gov.uk/prepare-file-annual-accounts-for-limited-company/overview>.

If you are in the US, the Internal Revenue Service (IRS), offers guidance about business expenses here: <https://www.irs.gov/businesses/small-businesses-self-employed/deducting-business-expenses>

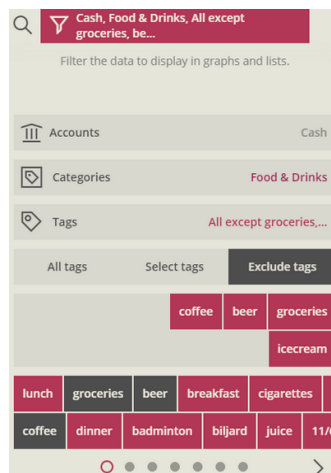
Expense management apps

If you choose the do-it-yourself route for bookkeeping or accounting, there are some excellent free and paid apps available under “receipts”, “expenses” or “accounting” searches via Google Play, The App Store and other app marketplaces. A few examples include *Toshl*; see <http://apple.co/2adDKS9> for Apple device users and <http://bit.ly/LGBgtG> for Android users, <https://toshl.com/> and *Finance PM* for Android, <http://bit.ly/2ai9cxT> via the Google Play store.

These are great time-saving devices because they make it so easy to log expenses as soon as they arise, so your bookkeeping is always up-to-date.

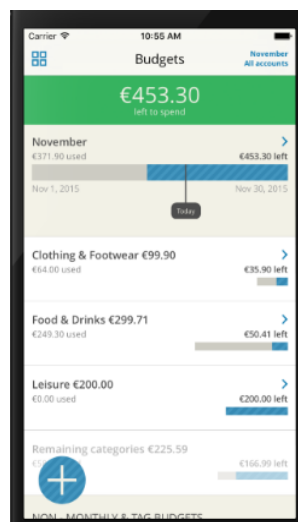
Fig 5, images i-iii. The Toshl mobile app

i) Adding expenses



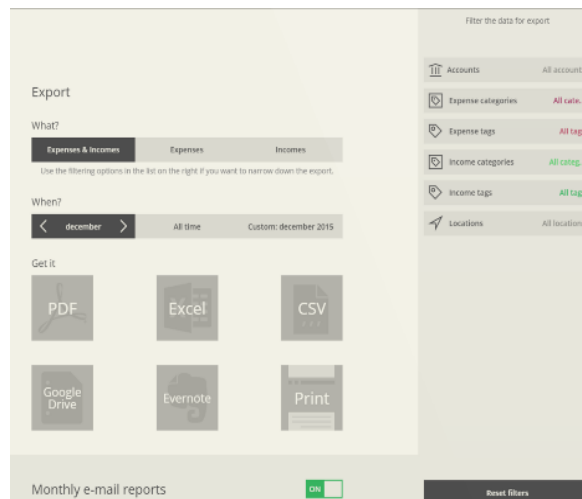
The labels in the apps are quite versatile, so you can customise them to suit your own purposes.

ii) Setting a budget



Budgets can be set within some apps, so the app subtracts your expenditure from the funds you have available.

iii) Exporting or printing your expense and accounting records.



In most cases, expense apps will allow you to generate a spreadsheet based on all the expense entries logged in the app. *Abukai expenses*, <http://bit.ly/2axnWpd> will let you photograph an expense and will turn this into a line item in a spreadsheet, which can be emailed to you. You can see from the example that Toshl offers several ways to export your data.

Finding an accountant

Many accountants offer free initial consultations to discuss their services and charges. You can find an accountant via the ICAEW - the Institute of Chartered accountants in England & Wales at <http://www.businessadvice.service.com/>.

A brief word about VAT

I won't go into a great level of detail about *VAT (Value Added Tax)* and *VAT registration* here, except to mention that sole traders and limited companies must become *VAT registered* once the business begins earning over £85,000 (correct at the time of writing in 2018.) Being VAT registered involves collecting and paying VAT to HMRC on a quarterly basis. There are some advantages to registering to pay VAT, even if you haven't hit the £85,000 threshold. These include creating the impression that you are a larger company, (possibly making it easier to do business with larger VAT registered organisations) and being able to claim VAT back on your own business expenses. In January 2015, a new type of VAT, *VAT Moss*, (*VAT mini one-stop-shop*), was introduced. As a result, VAT

due on the sales of digital services from businesses to consumers based in the EU must be charged at each customer's local rate of VAT. The £85,000 threshold applies to VAT Moss too. There is also a simpler, *flat rate VAT scheme* for businesses: <https://www.gov.uk/vat-flat-rate-scheme/overview>.

VAT and VAT Moss overviews can be found here: <https://www.gov.uk/vat-returns/overview>.

Next, let's explore your idea...

CHAPTER 2

How to develop your idea...and 5 market research exercises

“Learn from yesterday, live for today, hope for tomorrow. The important thing is not to stop questioning.”

- Albert Einstein

In this chapter:

- Why do people pay for products and services?
- Guided market research exercises: competitor research, market positioning and more!
- Google search secrets
- Project pitfalls
- Creating simple business plans
- Free resources
- Chapter challenges

Why do people pay for products and services?

When people pay money to a business, they're paying for services or products that give them what they *want* or what they *need* by either: i) solving a painful problem that they'd like to get rid of, or ii) bringing them a benefit or result that they would like to receive.

The more wants and needs your product fulfils, the more powerful your *proposition* (the idea you're intending to bring to market) becomes. Usually, the bigger the problem you solve or benefit you help people to obtain, the more you can charge for delivering it.

Can I share another quote with you? It comes from an American businesswoman called Alice Foote MacDougall, who once said:

*“In business, you get what *you* want by giving other people what *they* want.”*

Which problems and “wants” can you solve, and solve well?

Make customers your obsession

Walking in the shoes of your customers is essential when creating software products. For over ten years I’ve managed and been part of teams that have delivered websites and digital products used by members of the public and specific consumer target markets; including pregnant women, people trying to manage debt and people trying to buy their first home.

I’ve delivered many types of software for business users too, including applications used by journalists, accountants, administrators, sales teams, human resource departments, trainers and customer service functions!

I have spent countless hours observing and interviewing people as they use software, getting a feel for *what* they do and *why*, and trying to understand the relationships they have (or would like to have) with the software they use:

- What annoys, or frustrates them?
- What makes their lives easier?
- What are their needs, priorities and preferences?
- *Why* are those things so important to them?

Study the people that you hope will become your customers, startups so you can understand how they think and behave - the goal is to transition from *your* way of thinking to *theirs*.

Question, listen, observe, understand and *then* create a solution that fits.

Someone representing your business should spend time with the people who are eventually going to use your product, because:

- *You can’t create a product to satisfy a group of people if you don’t understand what they want, what they value and why they value it.*
- *If your product isn’t useful, usable or valuable enough, you won’t be able to build a solid customer base of people who will use or pay for it – and without that, you will find it difficult to build a viable business.*

In the Introduction, we saw that the number 1 reported reason for failing in the *CB Insights* study was a lack of real need for the product and reason number 9 was ignoring the customer! Neglecting your customers is one of the biggest pitfalls and ways to lose money on your venture. Seek to understand them, carry out market research, and carefully consider their wants and needs. Regularly

check-in with your target market as your product evolves to be sure that you are still on track to deliver a product that pleases them.

Have you ever been given a gift that wasn't right for you?

Maybe it was something that the person who gave it to you would love to receive. Trying to sell a group of people the wrong product is similar, but not only is the "gift" not right, but you're also expecting them to use *and* pay you for it!

To "nail" the perfect gift, you either need to know and understand the other person well, or ask them what they want directly!

We'll talk about how to interview potential customers, also known as *prospects* in Chapter 3.

You are at the start of an ongoing scientific experiment...

To maximise interest and sales, you'll want to make sure that you have:

- Identified a *problem* to solve - ideally a large or very painful one!
- Identified a group that needs a solution to that problem (i.e. your *target market*.)
- Come up with a *solution* that is *attractive and acceptable* to your target market.
- Identified a *method* to deliver the solution to your target market (either yourself or via a 3rd party) in an effective, economical and profitable manner.

Try not to assume that you have the 100% "right" product idea straight away, confirm that your theories and assumptions are correct.

Does your solution lend itself best to a web app that people will use on a desktop computer with a larger screen when they're at home and are less time-pressured, or is it a quick-fire, do "on-the-go" type of activity better suited to a mobile app? Are both relevant at different times of day?

Investigate different ways of delivering your solution to your target market and keep fine-tuning until the point where your idea is "ready" to be transformed into software delivered just the way your users want it.

Let your customers shape your vision.

One definition of entrepreneurship is "organising and managing an enterprise, usually with considerable initiative and risk." You can reduce the uncertainty and risk linked to your venture by *gathering data, seeking evidence, asking questions and making decisions based on what you learn.*

Don't rely on assumptions or guesswork!

Let's review some key questions...

Here are 5 questions to ask yourself about the market that you're considering:

- **What is the size of your market?** Is it big enough to support a business?
- **How sustainable is your idea?** What kind of longevity do you think your idea has?
- **What is the health / stability of your market?** Is the market experiencing growth, or declining? If you only have one product and a small budget, look for opportunities that will provide your business with a good foundation for growth.
- **Who are your competitors?** How many are there? What do they charge? How well are they serving the market? (Note that if there are a lot of competitors in the market, this can be a good sign as it means there's a lot of demand.)
- **What about the bigger picture?** Your business will be impacted by events in the wider world. What impact could external factors have on your business venture and what could you possibly do about this?

In the market research exercise below, we will review ways that you can start to gather the answers to all these questions.

A guided market research exercise

Initial assessment of demand and validating your idea

Here are some simple, but powerful market research exercises you can do to assess the idea and market that you're considering. (If you've done a lot of research relating to your idea, that's fantastic - try scanning down to see if there are any other angles you can cover off that you haven't considered yet.)

Are you ready to get started? If this isn't a good time, please set yourself a bookmark and come back to this section later.

Time required: 30+ minutes, per exercise, depending on how long you spend on each one.

Materials required:

- A device connected to the Internet and a web browser for searching (e.g. Internet Explorer, Google Chrome, Safari, Firefox, etc.)
- A pen and paper, spreadsheet or other method for recording notes.

Objectives: To assess the levels of demand, opportunity and risk associated with your product idea, before investing too much money and effort into it. By following the steps here, you will be able to gather information that could be used to refine your initial idea further.

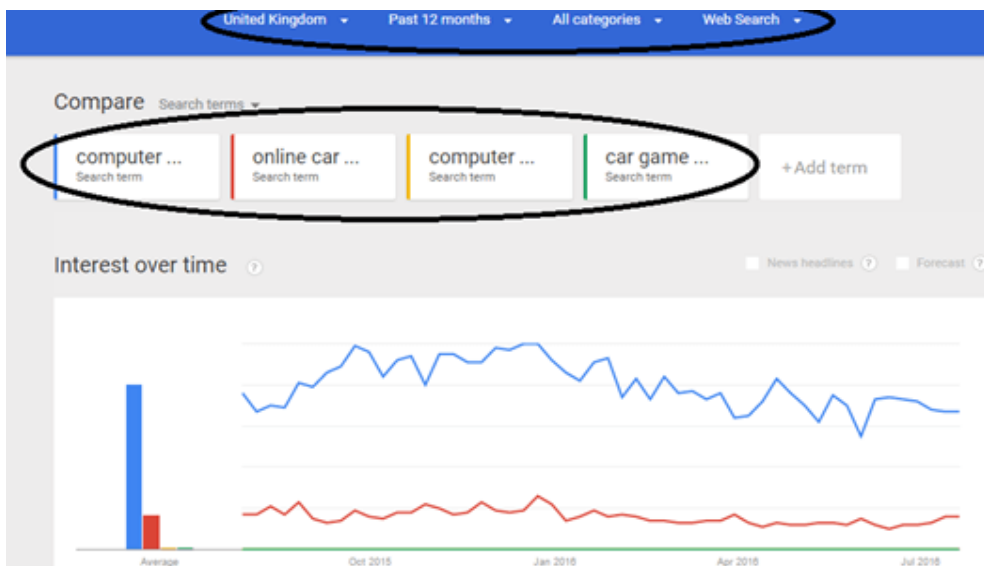
Here's a worked example. It can be applied to any idea, but let's imagine that you wish to build some **computer game** software. You want to see what types of computer game are most popular before you decide on a course of action. Follow along with me using this example, or complete the exercise based on your own ideas and area(s) of interest.

Google Trends and keyword tool exercises

Google Trends, <https://www.google.co.uk/trends> displays *trends* in the use of search terms over time (rather than providing specific figures). It's possible to search for global trends and local trends by changing the search filters available at the top of the page. You can compare up to 5 different *search terms* at once and can search within a specific time-frame.

At the top of the screen, you can see that I've set my regional search to United Kingdom. My search covers the last 12 months and I've chosen to look at Web Search trends as opposed to image, news or the other search options available. (See the blue bar at the top of the image, far right.)

Fig 6. A comparison search using Google Trends, based on web searches from July 2015 - July 2016



The boxes with the blue, red, yellow and green bands represent the four terms I've decided to compare and the bar and line graphs give an instant visual of their relative popularity.

In this example, I searched for computer games (with the blue band) as a benchmark and then decided to search for different types of computer game to see which search terms are most popular.

You can see that the term online car games (the red band) is the second most popular term, whilst the search terms represented by the yellow and green bands barely register on the graphs.

Persevere with your research until you find a computer game or car game sub-genre that looks promising. There are many combinations of search terms you could try if you were looking for car games; "formula 1 racing games", "road race games", "car simulation games" etc.

Look for ones with a consistent or upward trend in popularity over time.

Keyword tools

There are tools you can use to check the relative popularity of *keywords* used in searches on the web. These tools are generally used for *SEM* (*Search Engine Marketing*), which companies use when they wish to pay a search engine like Google or Bing to advertise their businesses by displaying them in people's search results. However, they can be used to gather a lot of useful information, even if you're not intending to pay for *SEM*.

The services below all provide *keyword volume data*, so you can see the phrases that individuals and businesses are searching for online, and the numbers of people running those types of searches. Do further research (and new keyword searches) on any phrases that you find interesting. A few examples of these tools include:

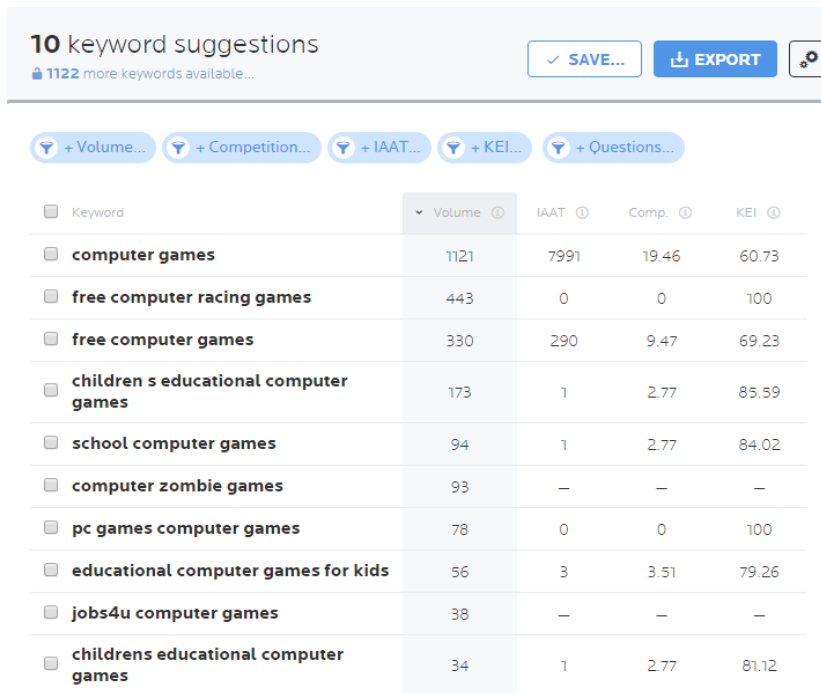
Instakeywords; <http://www.instakeywords.com/>

The *Google Keyword Planner* tool, which is part of *Google AdWords*; used for *SEM*, paid advertising to help companies rank highly on Google, <https://adwords.google.co.uk/KeywordPlanner>. (You may need Gmail and AdWords accounts to access this tool.)

Wordtracker; <https://www.wordtracker.com/?splash=true>

Wordstream.com; <http://www.wordstream.com/keywords/>

Fig 7. Running a keyword search for the term “computer games” using the Wordtracker tool



10 keyword suggestions				
1122 more keywords available...				
<div><div>+ Volume...</div><div>+ Competition...</div><div>+ IAAT...</div><div>+ KEI...</div><div>+ Questions...</div></div>				
<input type="checkbox"/> Keyword	<input type="checkbox"/> Volume	<input type="checkbox"/> IAAT	<input type="checkbox"/> Comp.	<input type="checkbox"/> KEI
<input type="checkbox"/> computer games	1121	7991	19.46	60.73
<input type="checkbox"/> free computer racing games	443	0	0	100
<input type="checkbox"/> free computer games	330	290	9.47	69.23
<input type="checkbox"/> children s educational computer games	173	1	2.77	85.59
<input type="checkbox"/> school computer games	94	1	2.77	84.02
<input type="checkbox"/> computer zombie games	93	—	—	—
<input type="checkbox"/> pc games computer games	78	0	0	100
<input type="checkbox"/> educational computer games for kids	56	3	3.51	79.26
<input type="checkbox"/> jobs4u computer games	38	—	—	—
<input type="checkbox"/> childrens educational computer games	34	1	2.77	81.12

Before we move on, let's clarify the meaning of the column headings shown in the Wordtracker example above:

Volume. The number of times a keyword has been searched for in the previous month.

IAAT (in anchor and title) shows how many web pages have a given keyword in both the title tag (the title of each search result) and anchor text (the clickable text in a link).

Competition. This number ranges between 1 and 100, and represents the number of optimised pages on the internet for each keyword. (The higher the number, the more web pages there are that contain the keywords.)

A high **KEI** indicates keywords which a lot of people are using when they search, but which have a lower *competition* in terms of the number of web pages that contain these keywords, measured on a 1 to 100 scale.

Competitor research and market positioning exercise

There are other quick ways to assess your competition or to refine your idea. Let's start with a 5-step process for the mobile app market, then we'll do the same for web apps.

Researching the mobile app market

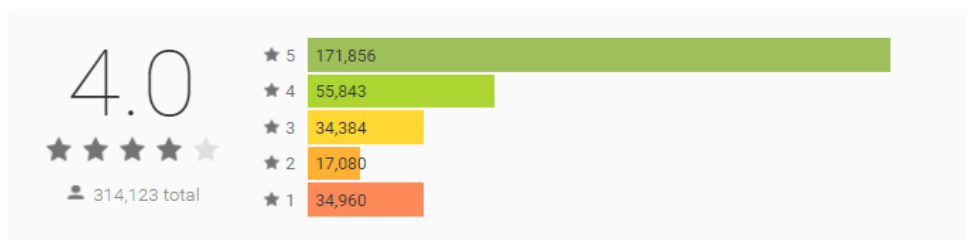
1. **Review some app categories.** If you are considering different product ideas, it can be helpful to see all the options that exist! Take a look at the *categories* of app available at Apple's App Store, <https://itunes.apple.com/en/genre/ios/id36?mt=8> or Google Play Store, (click the "categories" button in the top menu area); https://play.google.com/store/apps?hl=en_GB, or alternatively, visit the app stores via your smartphone.
2. **Look for gaps or areas of dissatisfaction.** Run a keyword search and look at the apps that are a close match to your area(s) of interest. Select 3 or more competitor apps with *overall* ratings of between 3 and 4.5. These are apps in the range from "O.k." to "very good." For each one, drill or scroll down and look at the proportion of ratings from 5* to 1*. The 5* reviews tell you what pleases users most about the app, 3* and 4* reviews reflect positivity, but indicate that some users feel the product "could be better" or has just fallen short of the ideal for some reason. Look at what needs improvement and *note the reviews with specific information included*: what disappointed the user or stopped them from giving a better review? The 1* and 2* reviews obviously reflect dissatisfaction. What do reviewers really dislike, or consider to be significant issues with the product and why? Look out for trends. *From what you have observed, is there an opportunity to offer a superior product or to position a new app so it covers functionality or services that have been neglected or overlooked?*
3. **Assess how good your competitors are at customer service.** Do they respond positively and professionally to customers' feedback? Do they even respond at all? Could you offer better customer care than them? Is there any sign that planned upgrades or bug fixes on the way to deal with the issues that you identified?
4. **Where do you fit into this picture?** Now that you have this information, you'll have more ideas about how to *position* your app. This may include things you should do (and avoid doing), the likes and dislikes of users of the app and what is important to them. These could be functional gaps -

the app doesn't do all the things that users would like, or in the way that they would like, or technical issues such as app crashes, bugs, complaints about too many adverts in the app, or other elements that annoy people. You may even be able to see reviewers' photos - this will give you an idea of the demographic that use the app, their ages and whether they are male or female. Does there seem to be a *type* of person that uses these apps? What do they say they use the app for? *This information is all absolute gold in terms of market intelligence and consumer research!*

5. **Review, reflect and take the next step.** Keep a record of your observations and ideas so you can easily review and compare all the information you've gathered. Armed with this information, there is an opportunity to build an app which is appealing in all the right ways, but avoids the worst elements of your competitors' products. In addition to quality, also consider what new or exciting twists you could provide to make your app unique, so it stands out within its category.

Fig 8. Star ratings for a game available in the Google Play Store

REVIEWS



To research a web (or desktop app), repeat a similar process:

1. **Run a Google search** for “apps” or “software” or “web app” or “SaaS” + [your area of interest]. Look at the results and the products that come up and investigate any relevant ones. (We'll talk more about different types of app in Chapter 7.)
2. **Look for product reviews** using Google and some of the big software comparison review sites such as *Capterra*, <http://www.capterra.com>, *G2crowd* <https://www.g2crowd.com> and *TrustRadius*, <https://www.trustradius.com>.
3. **Repeat steps 2 - 5 from the mobile apps section** above, using Google and the review sites to collect your data.

There is no reason why you can't review web apps when developing your product idea for a mobile app and vice-versa. The more data you can collect about functionality and customer preferences, the better.

Google research secrets

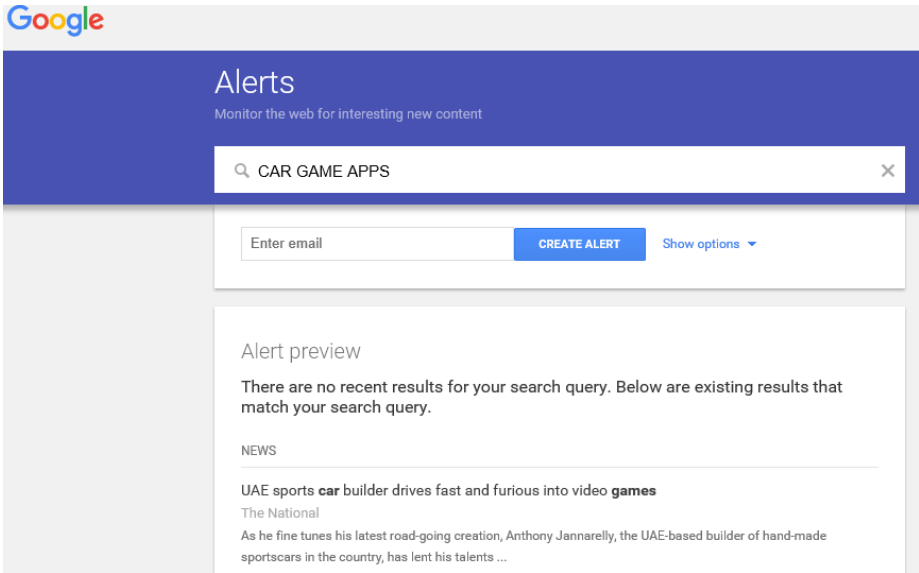
Get the most from Google with these less well-known search tools:

Get serious about searching with the *Google advanced search*, https://www.google.com/advanced_search. Include exact words or phrases, or choose to exclude specific keywords from your search results. You can add a + (plus) sign next to words that must appear, and a – (minus) sign next to words that you *don't* want to see in your search results.

Turn Google into your personal research assistant with *Google Alerts*, <https://www.google.co.uk/alerts>, useful for monitoring the latest news on your topic of interest. Put it to work collecting data from across the web for you 24 hours a day, 7 days a week!

Enter the keywords you're interested in, enter an email address, click on the "show options" menu and specify how often you want to receive notifications and you're set. Once your app is "live" you could set up an alert to see who's talking about it!

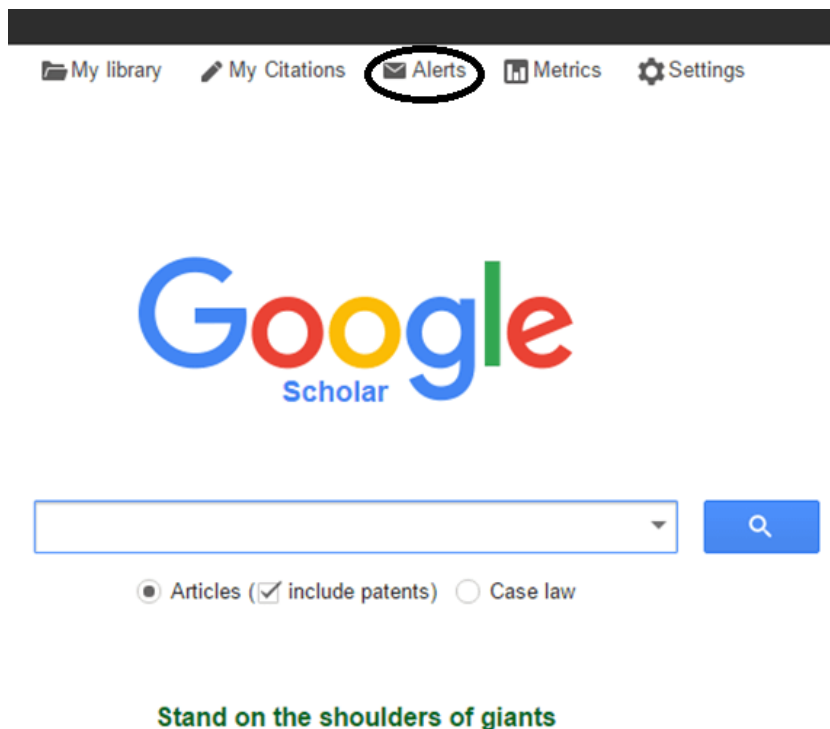
Fig 9. Put Google Alerts to work for you and receive alerts via email or RSS.



The screenshot displays the Google Alerts web interface. At the top, the Google logo is visible. Below it, the heading "Alerts" is shown with the subtitle "Monitor the web for interesting new content". A search bar contains the text "CAR GAME APPS". Below the search bar, there is a field for "Enter email" and a blue "CREATE ALERT" button. To the right of the button is a "Show options" link with a dropdown arrow. Below this section, an "Alert preview" is shown, stating: "There are no recent results for your search query. Below are existing results that match your search query." Under the heading "NEWS", a search result is displayed from "The National" with the headline "UAE sports car builder drives fast and furious into video games". The snippet below the headline reads: "As he fine tunes his latest road-going creation, Anthony Jannarelli, the UAE-based builder of hand-made sportscars in the country, has lent his talents ...".

Google Scholar, https://scholar.google.co.uk/schhp?hl=en&as_sdt=2000b will help you locate research published on your topic of interest including journals and research from leading institutions. Set up an *alert* so you can receive email notifications about your preferred topic(s).

Fig 10. Find the latest academic research on your topic of choice using Google Scholar



Google's *Consumer Barometer* can be used to review high-level trends across populations. It also provides insights into different consumer groups and their behaviour and usage trends across smartphones, desktops and tablets: <https://www.consumerbarometer.com/en/>

Other sources of market and business intelligence data

Libraries can be a fantastic source of market data that may not be free online. Some have access to the databases of big players in the business intelligence and market data industries. Contact your local library to see whether you can access it for free. If not, some of the companies offer an initial free trial:

Bureau Van Dijk provides company information and financial data for the UK, Europe and Australia via their *Fame* and *MINT* products, <http://www.bvdinfo.com/en-gb/our-products/company-information/national-products>.

To find global data, including the USA and Asia Pacific, consider using the *Orbis*, *Amadeus*, *Osiris* or *Mint Global* databases: <http://www.bvdinfo.com/en-gb/our-products/company-information/international-products> and <http://www.bvdinfo.com/en-gb/our-products/company-information/international-products>.

COBRA provides thousands of business guides, factsheets and reports, <http://cobra.cobwebinfo.com/>.

IBISWorld provides market research data, business and industry reports, <http://www.ibisworld.co.uk/>.

Key Note is a leading business intelligence company, <https://www.keynote.co.uk/>.

MarketLine Advantage profiles major companies, industries and regions, <http://marketline.com/>.

Analysis tools for businesses: PESTLE and SWOT exercises

PESTLE analysis

External factors beyond your control can have a big impact on your business. Products should evolve as customer demands and preferences change, but also as the business environment changes. Larger companies will make sure they have staff, (often people like me) to do research and analysis to make sure they are aware of and prepared for impending challenges, and small businesses should take precautions too!

The *PESTLE* acronym covers 6 types of external factor that you should consider and stands for - *Political, Economic, Social, Technological, Legal and Environmental*.

You may wonder how these factors might affect you, but at any time your customers' ability to buy from you might be affected by changes in the landscape in any of these 6 areas. For example, governments can change laws, and taxes on individuals, businesses, or products, which may affect business operations, and the spending power of consumers.

Technological advances can have a big impact on businesses, so watch out for new trends. These may result in software needing to be modified, or updated in order to keep pace with, or to take advantage of changes. Every time Google, Amazon, or Facebook change their algorithms or policies, companies of all sizes scramble to adapt!

Businesses must also pay attention to legal requirements and compliance with rules and regulations. See Chapter 6 for more information about the regulations that you may need to consider.

Using Google to carry out PESTLE research

You can't necessarily control external events, but keeping an eye on events and changes in the wider world *might* give you enough advance warning to take the necessary precautions. To make sure you're aware of any important factors or changes that will affect the market you're interested in, run some Google searches in the following areas and select the variation(s) that you are most interested in:

- "Compliance" or "legislation" or "law" or "regulations" + [your area of interest]
- "Technological advances" or "technological trends" or "latest technologies" or "new technologies" + [your area of interest]
- "Economy" + [your area of interest]
- "Growth industry" or "growth market" or "growth sector" + [your area of interest] and "industry decline" or "market decline" or "sector decline" [your area of interest]
- "Demographics" or "statistics" or "trends" or "data" + [the current or previous year] + [your area of interest].

You can see where I'm going with this. These keyword combinations will retrieve useful information, but you can experiment with other phrases too.

Project pitfall

Any developers that you hire will be counting on you to provide them with the correct information relating to any rules, regulations and legislation that must be adhered to when building your software and running your business.

Make sure you do your research in this area well in advance! In Chapter 6 we'll look at some of the rules and legislation which may apply to your business.

SWOT analysis

Another quick but effective tool you can use for assessments or decision making is the *SWOT analysis*. Grab a sheet of paper and write down the *Strengths*, *Weaknesses*, *Opportunities* and *Threats* (SWOT) associated with the topic you wish to review and then assess the positive and negative factors associated with it.

SWOT analyses can be used to review:

- A product or service
- Your own skills and abilities
- Your idea(s)
- Different competitors
- Different customer groups or markets

They can also be used to make comparisons. When you do your SWOT analysis, remember to include any new information you have gathered whilst reading this chapter.

An example

Strengths might include receiving consistent positive feedback about your product, or product idea and its features.

A lack of experience in the car gaming industry might be classed as a *weakness*.

An *opportunity* could be that you've discovered a gap in the market that you believe your product could fill.

A *Threat* might be a limited budget to build your software, or discovering that an existing player has also identified the gap and will be developing or upgrading a product to meet the demand.

If you get your keywords right, *Google Alerts* can be great for notifying you about opportunities and threats. You could even monitor competitors by name!

Fig 11. SWOT analysis table. https://commons.wikimedia.org/wiki/File:SWOT_en.svg, Xhienne

SWOT ANALYSIS



Comparing SWOT analyses for different ideas can provide insights you might not otherwise have had. Dig into this further - some weaknesses or threats may make an idea a non-starter, so you'll need to think about:

- Your ability to deliver a quality product
- The resources you have to get your product out to the market quickly (financial, or otherwise.)
- Whether your opportunities outweigh your threats
- Whether weaknesses can be overcome
- Whether there are enough strengths to make your venture worthwhile
- How your strengths can be maximised

Creating a business plan

Consider writing a business plan if you haven't done so already! If you're planning to go to the bank for a loan, expect to be asked to produce one.

In contrast with traditional business plans, the *Lean Canvas* and *Lean business model canvas* are quite interesting and thought-provoking documents to complete. They're short and to the point, yet contain enough detail to help you understand how you will build a successful business around your product. I've included several of the "lean" style of business plan here. I've worked on them with clients and for my own ventures and I think they're brilliant. The bank may still require a traditional plan, but you can transfer the information you've gathered into one later if you need to.

- Business model canvas; <https://strategyzer.com/canvas/business-model-canvas?url=canvas/bmc>, or <https://steveblank.files.wordpress.com/2010/10/business-model-canvas.jpg>
- Lean canvas; <http://3daystartup.org/wp-content/uploads/2014/04/lean-canvas.jpg>
- Business model canvas; <http://www.witszen.com/wp-content/uploads/2013/05/Business-Model-Canvas.png>

In the next chapter, I'll explain how to go beyond the figures that the keyword and business intelligence tools provide and gather insights directly from "real" people.

Get them done and check them off! Chapter 2 challenges:

- ☐ If you weren't ready or able to complete the market research exercises, set yourself a reminder to come back to them.
- ☐ Create at least 1 "lean" business plan. Give them a try - they'll really get you thinking.
- ☐ Reflect on what you've learned in this chapter. What conclusions can you draw, and what action(s) will you take as a result?
- ☐ Commit to trying to think like a scientist and consistently seek data and evidence to confirm that all is really as it seems. Does your idea need to be adapted in any way(s) to make it more useful, or relevant? How?
- ☐ Note the action(s) you'd like to take, based on the market research that you've done during this chapter and set due dates for them.

Everything you've learned will be wasted knowledge if you don't follow up!

Download the entire set of chapter challenges for this book in the form of a work book, with an activity log to help you keep track of important tasks:

<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/Free-resource-1>

CHAPTER 3

Creating customer profiles, and your first customer interviews

“The more you engage with customers, the clearer things become and the easier it is to determine what you should be doing.”

- John Russell, former VP, Harley-Davidson Europe

In this chapter:

- Identifying your target customers
- Customer profile creation exercise
- Finding customers to help you validate your idea
- Top 10 do's and don'ts for running customer interviews
- Sample customer interview questions
- Free resources
- Chapter challenges

In the previous chapter, we talked about approaching the development of your product like a scientific experiment. You can advance forwards, or stop to make corrections based on what you've learned, and use data and evidence to help shape your ideas. Now, we're going to look at how to gather data that will identify the right customers for your product and help you understand what their priorities are.

Creating customer profiles

When developing a product, creating profiles that represent your target customers is a beneficial exercise, whether you're planning to serve consumers or other businesses.

You may have come across avatars before - they are usually cartoon-style representations of people. *Customer avatars* (a.k.a. *customer profiles* or *customer personas*) may be paired with a written profile to help you visualise your *target customer*. This is a person that you have identified as being *most likely* to buy from you. Your target customer has *exactly* the type of problem(s) that you can solve and their wants and needs fit well with your product. Your *target market* is a broader group of potential customers. Imagine looking at a huge crowd (your target market) from a distance through a telescope, and then zooming in on one individual (your target customer.) It's much easier to try and understand one person's needs than it is to focus on a multitude of people at once. Another common term for people who might buy from you is *prospects*.

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Here are some examples from *YouGov*, an international market research firm. Note how they combine the image of the avatar with written details to create the overall customer profile. They have a fantastic profiling tool, <https://yougov.co.uk/profileslite#/> which looks at audience profiles across different companies. Here are some YouGov profiles for readers of *The Independent* and for *Instagram* customers:

Fig 12. YouGov customer profile for customers of *The Independent* newspaper.

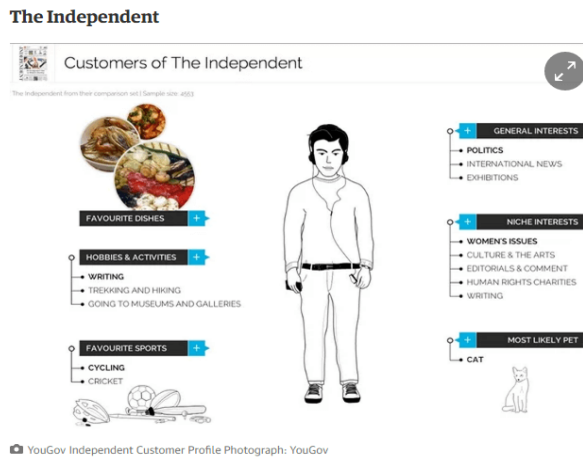
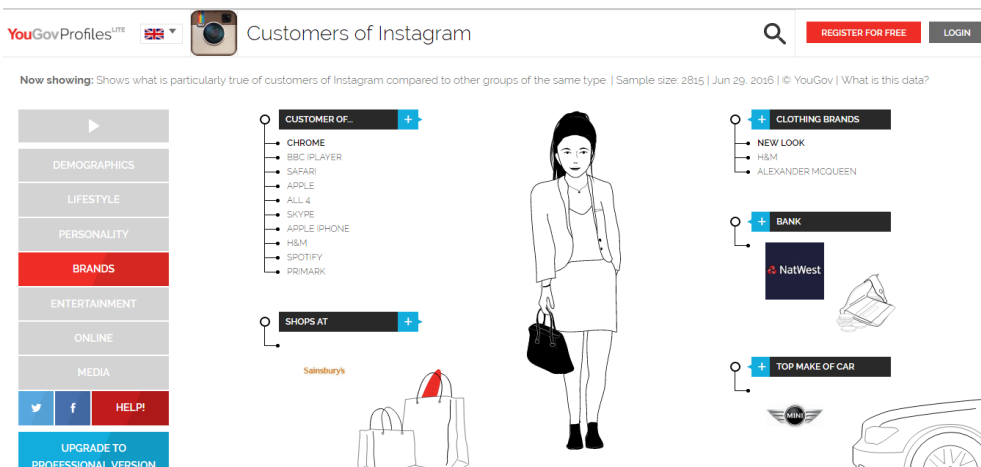


Fig 13. YouGov customer profile for Instagram customers.



Companies pay agencies thousands of pounds to create customer avatars for them, because they create a focal point which helps them hone their products. You have an opportunity to get these benefits free of charge!

A strong customer profile will help you focus on the types of people that you need to serve and communicate with to build your business. The insights you gain will make it worth the effort.

Consumer classification tools

You may find it helpful to approach this activity from several angles. There are companies that analyse and segment consumer populations and help businesses understand how to “speak” to their audiences in the right ways via marketing and advertising. They achieve this by providing *consumer classification* data.

US and general classifications:

<http://www.strategicbusinessinsights.com/vals/ustypes.shtml>

UK focused classifications: <http://acorn.caci.co.uk/downloads/Acorn-User-guide.pdf>

Consider the classifications that both these links identify and use them as inspiration as you create your own customer profile(s). As you look through them, you may be drawn to certain descriptions or may recognise that your target customer comes from a group that has already been “classified.” If this is the case, there may be a wealth of information about that group online that you can use to augment your knowledge. Look for research, statistics and trends, news articles, blogs and academic papers as a starting point. Use the Google search tricks from Chapter 2 to do some advanced searching and to set yourself alerts.

Customer profile creation exercise

Now it's your turn! There are a few things to note before you start:

- You can create profiles for multiple avatars. If this feels like the right thing to do, create them, take a careful look at them all, decide which ones feel like the *best fit* for your product and focus on those.
- If anyone you've spoken to so far has been enthusiastic about your product idea (especially if they say they would consider buying it), capture as much information as possible about their hobbies, habits, and lifestyle and consider using them as one of your avatars, at least until you have reason to believe that there are other profiles that would be more suitable.
- Use the YouGov profiler tool to search for products or brands close to your vision of your own product and see what you can learn! Remember

that everyone lives within a context. What customers are doing when they *aren't* using your product also matters. *Learning about their preferences and the products and services that they like to use could have a bearing on how you present and position your own product.*

Now start to imagine the type of customer that you wish to attract. Really try and see them in your mind's eye. Don't be shy - let's get into the spirit of this!

Fig 14. Customer profile form.

Review the forms below and complete the relevant parts:

Full name of avatar	Create a realistic name for your avatar which you feel suits their personality.
Gender	Could your avatar be of any gender or are you targeting a specific gender group? Does any particular gender feel like a better fit for your product?
Age	How old are they? State a precise age. Your target market will have an <i>age range</i> ; your target customer should have an <i>age</i> .
Family / Relationship status	Are they single, married or cohabiting? Do they have children? If so, how many and how old are they? Depending on what your product is, even the gender of their children could be important.
Education	Did they finish school? Attend college or university? Do they have a degree or more advanced level of education such as a master's degree or Doctorate?
Occupation	What do they do for a living? Are they "blue collar" workers, elite professionals or somewhere in between?
Job title	This will be useful if you're planning to create a B2B (business to business) product rather than one for consumers (B2C) and want to target

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	specific people such as HR Managers, CEO's or Marketing Directors.
Annual income	How much do they earn and how much disposable income do they have available to spend on products and services like yours? Are they looking for budget products, mid-range or luxury ones?
Home life	Where in the world does your avatar live? Do they live in an urban area, in a commuter town or out in the countryside? What kind of neighbourhood do they live in? Do they rent or own their own home?
Hobbies, groups, community activities and memberships	What do they do in their free time? Do they have any hobbies, or belong to any online, or offline groups, clubs or societies? (Once you know this, you'll have a much better idea of where to find your target customers, where to advertise or market your product and where to go when you need to gather feedback on your idea or product.)
Favourite newspapers and magazines	Which newspapers and magazines do they read? Is this done on or offline? (If you're considering paying for ads in newspapers, this information could be very useful. News publications know their reader demographics, so ask for their reader statistics before you pay for advertising space.)
Favourite websites	Where can they be found online? Which social media platforms do they use? (This will give you an idea of where to find your target group, where to advertise or market your product and where to find people to help with market research and product testing.)
You might also wish to consider the following:	
Vehicle	Does your target customer own a car? Ride a scooter or a bicycle? What make and model? How many vehicles do they own?

Industry sector	This may be relevant if your customers will be other businesses.
Company size	If you are looking to sell to businesses, what size of business are you targeting?

The inner world of your target customer

Let's spend a little time thinking about your target customer's inner world. This is another exercise to help you get "in tune" with your customer's problems, and how they think and feel.

Fig 15. The inner world of your target customer.

What are your avatar's problems, frustrations and challenges?	
What are their fears and concerns? What, if anything troubles them?	
What benefits are they hoping to receive?	
What are their hopes, goals and aspirations?	
How well does your product fit into this picture? <i>Does your product idea need to be adapted to better suit the target market?</i> <i>Or is there a target market that would better suit your product?</i> If you've had any a-ha moments, that's excellent! Please write them down.	

You can download a copy of this form and the customer profile form, with space to add your own avatars' details at:

<http://www.mylanderpages.com/donthireassoftwaredeveloperuntilyoureadthisbook/5-customer-profile-avatar>

Creating an avatar to represent your target customer

Here are some examples of avatars that can be used to represent consumers or business customers:

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Fig 16. Freepik avatar creator tools. Male avatar creator.

http://www.freepik.com/free-vector/male-avatar-creator_822151.htm



Fig 17. Freepik avatar creator tools. Female avatar creator.

http://www.freepik.com/free-vector/woman-avatar-creator_824042.htm



Fig 18. Freepik avatar creator tools. Business team avatar examples.

http://www.freepik.com/free-vector/business-team-avatar-collection_874660.htm

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You can choose a cartoon-style avatar as seen in the Freepik designs, but you can also use an image that you feel represents your target customer, or even do a hand drawing.

Practical applications

You should now have version 1 of an avatar and customer profile to work with!

Understanding what they want, value and hope for will help you to create a product well-suited to their needs and an effective and targeted marketing plan in the future.

Now, you can start making decisions that take your avatar(s) into account, including shaping the way your product evolves. This might feel a bit odd at first, but thinking like this will allow you to make some very clear decisions about what is, and isn't right for your target customer(s), from the product itself right through to the way you market and promote it. Ask yourself:

- “How would my avatar, [insert avatar name] feel about this? What would they expect?”
- “How would my avatar like to perform this task?”
- “How could my product make life easier and more convenient for my avatar?”
- “What part(s) of my product will my avatar value the most?”
- “How could I make using my product a more enjoyable experience for my avatar?”

- Would my avatar like this social media post?

Continue to update your customer profile(s) as you learn more about your target customer(s). They should evolve over time. This is just the beginning!

Remember that you're testing theories...

Remember to consider everything you *think* you know about your customers to be a theory or assumption until you have enough evidence to be sure. The earlier you find out that things may not be as they first appeared, the easier it will be to adjust your plans and make your product into what it needs to be. Stop and reflect, then work out what to do next. You may need to make some adjustments, or abandon certain plans altogether. This could be disappointing, but it isn't a failure - you could have lost time and money in pursuing the wrong type of customer or building the wrong type of product. Agile and Lean principles support the concept of "failing fast", then making adjustments based on what has been learned, and trying again. This is what entrepreneurs do!

Finding target customers to interview

Evaluating an idea or product using customer interviews or user testing sessions can cost as much as several thousand pounds *per session*, if set up by professional *recruitment* or *market research agencies*.

These agencies will find people from your target market that are willing to be interviewed. Some agencies will run the tests for you, others will expect you to run them yourself.

This may or may not include venue hire costs (if you would like a venue to be provided for the testing sessions) plus an incentive payment ranging from between £30-100 for each person that is interviewed as payment for their time.

If you don't have the budget to hire a specialist company, then you'll need to find your own participants and run your own interviews.

Now you've gone through the avatar creation process you'll have a list of possible places where your target customers might be found, including membership groups and profiles on social media sites. At the time of writing, these were the most popular social media sites in the US and UK:

- *Facebook*
- *YouTube*
- *Twitter*
- *LinkedIn*

- *Instagram*
- *Pinterest*
- *Google+*
- *Snapchat*
- *Tumblr*
- *Reddit*
- *Flickr*
- *Meetup.com*

You may also wish to consider *Medium*, and *Producthunt.com*, too.

If you know of any specialist membership sites, forums or groups that might be relevant, try those too. If not, try Googling for membership sites, forums or groups, plus your specific area of interest, including the words “top”, “biggest”, or “largest.” Don’t forget to join relevant Facebook groups as well!

Ease into the task of finding people to interview by starting with friends and family and asking for introductions to *their* friends and family. Consider attending networking groups and events where you can speak to people who may be in your target market face-to-face. Meetup.com <https://www.meetup.com/> and Eventbrite, <https://www.eventbrite.com/> may be able to help you find local events in your area.

When reaching out to people you know, or have been connected with:

Create social media posts, let people know what you need and ask them to share your messages.

When people respond, try and get at least some face-to-face interviews arranged if you can - it will be easier to build rapport in person and you will be able to observe people’s facial expressions and body language as you talk to them about your product idea. You could offer to treat people to a beverage or lunch when you ask for their time.

When reaching out to people you don’t know:

Try joining relevant groups on each social media platform that you use. Post within the group, and if possible drop people in the groups short messages which are relevant to them, using their name if possible, so your communication doesn’t feel impersonal and generic. Explain who you are and what assistance you’re looking for. If there is anything you can exchange in return for their time

and effort, let them know that too. Some people will be willing to help; others will want to know how getting involved will benefit *them*. Not everyone will have the time or even the interest in helping, but from a statistical perspective, the more people you ask, the more will say yes!

This article contains some useful tips for reaching out to people online: <https://www.linkedin.com/pulse/20130624114114-69244073-6-ways-to-get-me-to-email-you-back>.

Ask people how they'd prefer to be contacted and try to be as flexible as possible. Be prepared to make contact via phone, Skype, Google Hangouts or using other methods.

What should you ask your target customers?

Gather as much data as possible, so you can refine your product idea or *proposition* (your proposed solution to the problem) through:

- Understanding more about their needs and problems.
- Learning whether the target customers you identified *really are* your ideal customers - are your avatar(s) accurate or not?
- Discussing *how* you might solve the problem (if you already have an idea of how the product might work.)
- Looking for trends - specific likes and dislikes, and any commonalities. What do people strongly agree or disagree about?
- Testing the waters to see if people would pay for the product. If so, how much and if no, why not? Under what circumstances *would* they pay for it?

It's not just what you ask, but how you ask it...

Training as a coach and working as a market researcher forced me to work on getting rid of some of these commonplace habits. Do your best to avoid them when you're interviewing, and you'll get much better-quality responses.

Here are my top 10 do's and don'ts when running customer interviews, testing prototypes and standard user tests:

- **DO be organised.** Have a notepad to hand or ask for permission to record the conversation. Listening to recordings will also help you improve your interview technique. Prepare a set of questions to ask in the form of a

script. Ideally you should be consistent, asking *every customer the same set of questions* so you can compare them more easily later. However, changing the *order* of questions can be beneficial to the interview process. Do a few interviews, see what works, then update and reorder your script if needed. Run through any exercises and questions you've prepared a few times to check for issues before your first interview and read your script out loud too - interestingly, you'll pick up on different issues via your auditory sense than you will just by reading it.

- **DO put people at ease before you start.** Explain there are no right or wrong answers and that you would appreciate their honest opinions and feedback. (When testing a prototype or product, assure them that you are testing *it*, and not them!) Ask some warm-up questions; a summary of who they are and their occupation can be a good way to start. Ask them how they are or how their day was, then recap on why you're speaking to them. Don't tell them *exactly* why until the end, otherwise you risk introducing *interview bias*. This happens when an interviewee says what they *think* you want to hear to please you, or to avoid offending you. That would count as a *false positive*.
- **DO be prepared to repeat yourself.** Let people know that they should ask you to repeat any questions that they feel are unclear.
- **DO ask open questions...and ask for full explanations.** There's nowhere left to go if someone responds with a "no," so ask *open questions* and start your sentences with *Who, What, When, Which, Where, How* and *Why* and not "Do you?", as this can close conversations down quite quickly. Other good questions include, "How often do you...?", "When was the last time you...?", "What made you say that?", "How does that work?", "Can you tell me about...?"
- **DO be encouraging.** Keep saying things, like "Uh-huh", "Keep going", "Tell me more." This is especially important if you're on the phone, to confirm that you're listening and are still there! If people don't explain the reason for their comments, ask "What makes you say that?" or "How come?" to prompt them to go into more detail.
- **DON'T lead people.** *This is very important.* Saying things like "Would you like a [your product]?" and "Would you pay £4.99 for an app that does [whatever your product does]?" are pushing someone in the direction you want them to go in. You could end up with false positives if you lead people to the answers you want. You want to know what they would *really* do and what they *honestly* think.

- **DON'T fill the silence.** Ask a question...*and then stay quiet!* Don't try and fill in the silence by asking another question, or ten! If you know anyone who has a habit of asking many questions on top of each other, I'm sure you'll agree that it can be a bit maddening after a while, *so give each person space and time to think.* If you ask multiple questions at once you'll break their concentration, which disrupts the process. Silence may make you feel a little nervous, but over time you'll feel less self-conscious about it. *Nothing fatal happens during a silence and some great insights can come during those moments.*
- **DON'T fire questions at people - or interrupt them.** Don't direct questions at people like machine gun fire, or make them feel like they're on trial and facing a prosecuting lawyer! Create a calm atmosphere, listen carefully and don't interrupt! If another question pops into your mind, write it down so it doesn't distract you and get back to listening, otherwise you might miss something important.
- **DO push for negative feedback.** Always ask what people *don't* like, what isn't clear and what's annoying or confusing. You want to find out as many negatives about your proposition as possible, *before* you invest in building a product and to allow you to make essential adjustments.
- **DO make it a positive experience.** As the product develops you will need regular feedback to stay on track. Try to make the interview experience as pleasant, professional and interesting as possible so people are happy to talk to you again in future when you have more to discuss or show to them.

Running customer interviews

To begin, create a set of interview questions to help you gather *information* and *evidence*. Shall we start with a few examples?

A customer interview about computer games

The benefits of games and the problems they solve include alleviating boredom, escapism, relaxation (or stimulation) and social contact and a sense of belonging in the case of team games. These are my *hypotheses* on why people play games. Now I'll need to prove them *and* decide how the things I learn should shape my product development decisions.

When starting the interview:

Take down the person's details - name, age (or age bracket), job title and details of hobbies and websites visited regularly to help you build up a picture of each customer. Compare these with your avatar and customer profile. What do you learn?

Begin with some general questions about the problem that your product solves as a "warm up." It would probably be inappropriate to ask people directly whether they play games for escapism or social contact, but you could ask how people spend their free time and when they play games and expand the conversation from there.

Ask about people's daily schedules - do they drive or take public transport to and from work? How do they spend their time during the commute? When they get home, what happens? If they try to relax and wind down, how do they do this? What hobbies and activities do they pursue after work and at weekends? Find out where gaming fits into their life currently. Ask about the games they currently play, and the positive, and negative points about these games.

In this example, you're looking to identify all the free time and windows of opportunity for playing games and how long each window lasts, because you want to know *how much time people have to play* your game and to understand their *current gaming habits*. There's no point creating an immersive game that needs an hour to complete if your target customers have just 15 minutes of free time here and there throughout the week and don't have much time to play at weekends.

Next, ask them to tell you about *the last time* they played a computer game. Asking about the last time that a user performed an activity is a question used by professional researchers. It's a great question because the answers you receive should be purely based on fact and what people really *have done*, rather than what they *might do*.

Topic of discussion	Sample questions
Regular habits	How <i>many</i> games did they play in a row? Which day of the week did they play? Find out if this is the norm, or not. What time of day was it? Find out if this is the norm, or not. How <i>often</i> do they play during the week?

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	<p>What about at weekends?</p> <p><i>How long</i> do they play for?</p>
Preferred devices	<p>Which device did they use to play the game?</p> <p>Do they play on any other devices?</p> <p>Which, if any, is their preferred device and why?</p>
Specific questions about the game	<p>What type of game was it?</p> <p>What happened? What was the result of the game? (Win, loss, draw, level reached etc.)</p> <p>Which options and settings available within the game did they use? Ask them to tell you all the ones they use on a regular basis.</p> <p>This may lead to you gathering other information on the topic.</p>
Preferences, motivations and competitor research	<p>What do they like about gaming in general?</p> <p>What are the pros and cons of the games that they play?</p> <p>What are their <i>favourite</i> types of games?</p> <p>Why do they like those games?</p> <p>What do they like the least about them?</p> <p>What do they find most annoying or frustrating?</p> <p>What is most important to them about these games?</p>
Further exploration	<p>If people can show you their games and walk you through how they play them, and their strategies, even better - this exercise is also about understanding the mindset, motivations and inner world of the person you're speaking to.</p>
Gathering feedback about your own idea	<p>If you're ready to do so, talk about your idea directly or indirectly and note the reactions of the person you are interviewing. Ask them to tell you what they like and dislike about the idea and why.</p>

These questions can be adjusted to suit most topics, just insert your area of interest.

Of course, products can be very different, so here's a second example:

A customer interview about a mobile app for scanning documents

If you wanted to create a document scanning mobile app, which allows the user to take pictures of documents with their phone and then share, upload or email them, you might start out by asking people what kinds of documents they send, and receive and where they come from. From here, discuss each item they mention in turn, gathering as much information as possible.

You might also ask how they manage physical paperwork at home. Do they scan letters, contracts, or other items? What kind of documents do they scan most often? Where do they come from – and where do they keep them? You could explore what annoys or frustrates them about managing documents, and investigate if there is anything time consuming about doing this, and what they find most difficult about the process. Find out who else is involved. Who do they send documents to, or receive them from, and why?

Then you might ask about *the last* set of documents they received, or sent. What happened, and why was this important? How did they deal with them? What was complicated about the situation, and what would have made the situation easier for them? Take down the names of any products they mention, so you can investigate any competitors. Ask for an opinion about these products and note down their strengths, and weaknesses.

Now check you have not missed any vital information.

Ask the interviewee if there is anything else they'd like to add. Are there any other ways that they want to be able to manage, send or receive documents that have not yet been discussed? Ask further questions as needed!

If you are ready to do so, talk about your idea directly, or indirectly and note the reactions of the person you are interviewing. Ask them to tell you what they like and dislike about the idea and why. Note down all the ideas and suggestions that come up.

Note the words people use when they converse with you and stay alert for any slang or jargon used. As well as helping you to learn more about your customers, this information will be useful for marketing later. Use terminology that your target market is familiar with to grab their attention.

Log and analyse your feedback

There's a simple analysis technique you can use to review all the feedback received, called Plus, Minus, Interesting, which I've adapted into an easy to use record sheet. You can download a copy of the Plus, Minus, Interesting (PMI) log:

<http://www.mylanderpages.com/donthireasoftwaredeveloperuntilyoureadthisbook/Free-resource-3-pmi-log>

Fill in each column as follows:

Plus. Note down all positive feedback and expressions of interest. Strong positive feedback would include comments like: “I really like it!” “That would be useful, because...”, “How much would you charge for this?” and “When can I get it?”

Minus. Write down all negative feedback or signs of disinterest in the product idea. If people say the idea would *not* be useful or solve their problem and if they dislike *the way* you propose to solve the problem, note this down.

Interesting! Note down any surprising feedback or information. This could relate to how people would like to use the product, insights gained or new ideas and suggestions that you receive. What do people value or get most excited about? Which devices do they prefer, mobile or desktop? *How* do they want to use the product? Also, note down the other products mentioned and any other information you gain from them, both good and bad.

General notes. If you wish to create a product for businesses, note the industry sector, number of employees, turnover and age of the company. Note down what people say word for word and even the phrases they use. This is all excellent information to help you understand your customers. Keep a record of who seemed most interested in the idea and their age, gender and other things you know about them, so you can start to build up a profile of what type of person (or business) likes your product the most.

Get them done and check them off! Chapter 3 challenges:

- ☐ Download a copy of the customer profile and customer inner world forms and complete them. Create your customer avatar(s) and customer profile(s).
- ☐ Prepare yourself mentally for all types of feedback. How will you manage less positive feedback or suggestions, yet remain motivated, and open-minded enough to take away useful information?
- ☐ Create a plan for yourself and start doing customer interviews, so you can gather feedback about the product and test out the theories about your target market and avatar(s). Create a list of people you will interview, starting with people you know and decide if you will reach out to others via social media or other channels that you have identified.
- ☐ Evaluate the feedback you’ve gathered. What have you learned?

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- ☐ What “a-ha” moments have come from reviewing all the data in your PMI log? (Get a copy of the log via the download link provided earlier in the chapter.)
- ☐ What customer problems have you identified? How will you use this information?
- ☐ Do you need to adjust your idea to make it fit in more with customers’ needs?
- ☐ Store all this information. Some of it may need to be turned into requirements and discussed with your developer later. Perhaps you could create a business research folder to hold your data...
- ☐ Update your avatar(s) as you learn more about how your market thinks and feels.
- ☐ Write down the actions you need to take based on feedback from your customer interviews.

Download the entire set of chapter challenges for this book in the form of a work book, with an activity log to help you keep track of important tasks:

<http://www.mylanderpages.com/donthireasoftwaredveloperuntilyoureadthisbook/Free-resource-1>

SECTION 2

TECHNICAL AND SOFTWARE DELIVERY BASICS

CHAPTER 4

An introduction to Agile principles

“Agile means...to be nimble and adaptable. To embrace change and become masters of change, to compete through adaptability by being able to change faster and cheaper than your competition can.”

- Craig Larman, author and co-creator of LeSS (Large Scale Scrum)

In this chapter:

- An overview of the Agile philosophy
- User stories and product backlogs
- The software development life-cycle; and a few sports analogies!
- Why Agile is a great framework for startups and entrepreneurs
- The benefits of hiring developers with quality Agile experience
- Chapter challenges

Organisations such as Google, Spotify, Amazon and Microsoft have all used Agile in its various forms. Now, let's consider how Agile methods can help you achieve positive results.

Agile teams believe that:

*Focusing on delivering value for customers,
Seeking feedback and making incremental improvements,
Taking time to reflect on what works and what doesn't,
Controlling the duration of tasks and activities,
Maintaining effective team communication and
Keeping things simple, all increase the chances of projects succeeding.*

“Agile” is actually an umbrella term. The Agile family includes XP (eXtreme Programming), Scrum, Kanban, Lean and DSDM (Dynamic Systems Development Method) frameworks. It is usually contrasted with Waterfall, a more traditional software development methodology.

Agile frameworks emerged from a desire to overcome some of the issues known to plague “traditional” software development projects - long wait times for software to be delivered to customers, a lack of flexibility from the customer paying for the software or the technical teams delivering the software and unsustainable working practices.

The Agile mindset reflects a more pragmatic approach to building software *in the real world*. There is an acceptance that we will always have the *least* amount of knowledge at the start of a project. However, over time we will learn more about what our product should become - which could be very different from the original vision! Making adjustments as we learn requires change, and Agile allows us to manage this flexibly *and* efficiently.

There is an *Agile Manifesto* (see the link at the end of this chapter) that focuses on *putting people, customer interaction and communication* first.

Timeboxing is a time management tool used regularly in Agile teams to keep tasks, meetings and non-development activities focused. Agile makes use of *timeboxed*, recurring development cycles called *iterations* (meaning “to repeat”), which usually last anything from a week to 30 days before they end and then begin again. At the end of each iteration there is an expected output from the development team, which was defined at the start of the iteration. Agilists believe in making frequent releases of software (a mantra usually referred to as “release early, release often.”)

The terms “to iterate,” or “iterate over” are used to describe the process of improving something (in our case, a product, or idea) in stages.

Agile teams add functionality *incrementally*, over a period of time to enhance or extend software applications. This is in contrast with the “*big bang*” style of release associated with Waterfall, where a large amount of functionality, usually built over a longer period is delivered all at once.

There is often some degree of “learning on the job” that goes on in development projects - especially if the type of product or the technologies being used are unfamiliar. This is normal, but the balance should be more towards coding than learning, most of the time. Agile teams use *development spikes* (which are timeboxed technical investigations), to gather information so that decision can be made, or to undertake research that answers questions such as: “Can we do it?”, “Should we do it?” and “*How* should we do it?”

See Chapters 20 and 21 for more about using timeboxing to help you manage your project.

XP, Scrum, Kanban, Waterfall?

I agree, the names are a bit unusual. Allow me to cut through all the jargon!

I wholeheartedly believe in using Agile principles to guide the software delivery process, and I have followed Scrum, Scrumban (a Scrum/Kanban hybrid), Kanban and XP practices throughout my software delivery career. Agile is ideal for the fast changing, “suck and see” world of entrepreneurship. It is well-suited to environments that are unpredictable or uncertain, markets which are competitive, those where change happens very rapidly or where there is fast growth.

I’ll explain, (and demonstrate) how to create a simple software development process based on Agile principles in Chapter 22, so that you can get off to a solid start when you begin to build your product.

Each member of the Agile family has its own set of practices. Let’s look at each in turn:

Scrum’s repeating development cycles are called *sprints*. *These are* usually 2 or 4-week release cycles, where the team *prepares and then builds a defined set of functionality* pulled from a product to-do list called a *product backlog*. This is a prioritised set of requirements and tasks, and includes user stories, features, requirements, enhancements, technical tasks and bugs. The order of items can be changed and work can be prioritised and de-prioritised. We’ll talk about capturing requirements for your backlog in Chapters 11, 14 and 22, and I’ll explain what user stories are later in this chapter.

At the end of the sprint cycle, the team demonstrates the work to their customers. The team then reflects on the highs and lows during the sprint and brainstorms ways to make improvements for the next one. The cycle then starts again.

Scrum has four “ceremonies”, *sprint planning meetings*, *daily scrums* (often called *stand-up meetings*), *sprint review meetings*, and *sprint retrospective meetings* (commonly known as *retros*). Stand-up meetings are daily micro-meetings that focus on what has been done, what will be done and raising any issues that prevent or impede progress, known as *impediments*, or *blockers*, which we will discuss in Chapter 22.

There are several key *Scrum roles* including:

ScrumMaster, (*this spelling is correct, but you’ll see it spelled Scrum Master too*) servant leaders who act as facilitators, sometimes perform project management

duties, but always help the team operate efficiently and effectively and shield them from distractions.

Product Owner, those responsible for setting the vision of the product and the prioritisation of tasks on the *product backlog*; *the product to-do list*.

The Scrum team. The technical staff, (including developers) who work together to deliver the functionality.

It's important to be aware that there will be skill-gaps on a project with a small number of team members. If you understand what and where these gaps are, you'll have a far better chance of making sure that important tasks get done at the right times and aren't overlooked or forgotten.

For that reason, we'll review these roles and others in more detail in Chapter 5.

XP (short for eXtreme Programming), is known for the practice of *pair programming* (This involves two developers working on a single task on a shared *computer*, writing code and solving problems together.) "Two heads are better than one," as the proverb goes! Followers of XP believe that together, developers will come up with better solutions than they would do alone and that quality will increase as the paired developers pick up on each other's mistakes. XP has iterations (not sprints), which usually last 1 or 2 weeks.

Kanban, which means "card" in Japanese, emerged from the working practices at the Toyota car manufacturing plants, and favours JIT, (Just In Time planning.) This means not planning *too* far in advance due to the possibility of change, and setting limits on the number of tasks that each team member can have in their work queue to control throughput and avoid bottlenecks in the software development "production line". There is also a strong emphasis on eliminating waste, which includes factors such as how well the team passes tasks between members without creating time lags, and how disruption and distractions can be minimised within teams.

Scrumban is a hybrid of Kanban and Scrum, whilst **Lean**, like Kanban emerged from the manufacturing sector and places an emphasis on customer value and eliminating waste.

User stories and The Product Backlog

It can be challenging to explain what your requirements are - especially in great detail, but this is very important. *User stories* are used across all the Agile frameworks as a way of breaking down requirements into very small components that can be more easily understood, managed and built because they have been simplified as much as possible.

User stories are small, self-contained units, or “building blocks” of functionality. When added together and assembled, they result in a larger body of functionality, a system or a product.

User stories focus on the people that will use the software, who have specific roles or tasks to perform. These are our *users*. In the user story context, these are also called *actors*, and the user story should describe *what* the actor (or user) wants to do and *why*.

As long as user stories contain all the important elements and can be understood by your team, they can be written in any format, although some product development teams will use the GWT (Given-When-Then) approach to write them. This can make it easier for developers to translate each user story into code.

A common format for summarising, or describing user stories at a high-level is:

As a [insert type of customer / user / actor]

I want to be able to [insert the goal]

So that I can [insert the benefit]

This helps the person writing the story to think about who the functionality is for, what the functionality should do, and what the benefit is.

For example...

If you were building software to help media companies display content on their websites, one of the many user stories you would require would include one to allow articles to be published online. The story might be described something like this:

As a journalist

I want to be able to publish an article.

So that readers can view it on the website.

If you were to develop software for the construction industry, you might have a story like this one:

As a builder

I want to be able to search for a list of wholesalers by postcode.

So that I can find a wholesaler based close to my place of business, where I can buy building supplies.

This is just an overview of the stories, there is still a lot more detail that needs to be provided! User stories are kept on the product backlog, along with additional information about the functionality required for the story and how it should work.

For the purposes of this book, I will be focusing on clarifying the sorts of information you'll need to gather for your developer in order to save money and time during the build process, rather than focusing on the intricacies of user story writing and the use of specific guidelines and conventions. We'll keep all the benefits that come with creating good user stories, though!

In Chapter 14 we'll talk about the types of information that your developer will need from you and there's a reminder in Chapter 22 that you can use as your app is being built.

The Software Development Life Cycle (SDLC)

Software development has a life-cycle, and to stay on top of your project, you'll need to be aware of what stage of the cycle you're at, what needs to be done at each stage and why each stage is important. The basic elements of the cycle vary slightly in terms of terminology and where the cycle "officially" starts and ends, before it continues again, but it is generally the same regardless of whether you follow the Waterfall methodology, or Agile principles. What differs is how frequently the cycles repeat, the mindset of the team(s) involved and how they organise themselves and approach the way they build the software.

I'm going to talk you through the cycle. Look out for the jargon - as usual, it will be useful when you need to talk to developers or other technical people:

- **Concept.** This stage includes the birth of the initial idea, the exploratory work needed to decide whether the idea should be pursued and the development of the idea through customer interviews, market research and data analysis. (Some also call this the *Discovery* phase.) If you've read Chapters 2 and 3 - you'll recognise that you've worked through the concept stage already. Great news!
- **Requirements gathering and analysis** includes taking the initial concept and producing a set of *requirements* (the description of what the users of

the software will need to be able to do, as well as the technical tasks that must be actioned if the software is to run reliably.) This stage involves mapping out the steps and processes involved in helping users get from “A to B” using your product, (these steps are called *user journeys*), and how the system will need to behave in different scenarios and under different conditions.

- **Design** should not be confused with *visual design*. In this context, we mean *architectural design*, which looks at how the system needs to be *architected* to fulfil the requirements, and your vision for the app. Architectural design considers the components of the system; their structure and organisation, and the types of data that you will be handling. It also considers the hardware to support the product, possible risks and challenges, and the programming language(s) that might best be used to build the product.

Strangely, the SDLC does not always explicitly mention the user experience (UX) and visual design elements of the process. This would include the creation of wireframes (which outline the layout of the screens that users will interact with), and the design of the product, so it is easy and pleasant to use. Colour schemes and other visual elements of the product’s design will also need to be planned in advance of the build stage and handed over to those building the product, so it is built according to the visual design that has been prepared. See Chapters 5, 11 and 12 for more information on these topics.

- **Build** (also called the *development* or *coding* stage.) This involves writing code to fulfil the requirements gathered during the requirements gathering and analysis stage, and integration work to ensure that all the functionality that is part of the product (whether it was built by your developers, or bolted-on), all behaves as one cohesive unit. The build phase also includes solving any technical problems which arise as the product is built.
- **Test.** This covers the discovery and management of issues and faults and identifying any parts of the product that don’t behave, or work together as intended. Testing also involves getting feedback from users via user testing, usability testing, user acceptance testing and beta testing. There are many different types of testing for different purposes and in Chapter 23, we’ll review several that you will need to be aware of. Testing is an *absolutely critical* part of the cycle which is often denied the respect and attention it deserves.

The amount of testing you do and how thoroughly you do it can have a significant impact on the quality of your product.

- **Release.** *Releasing, going live, deploying, pushing to live, or shipping* all mean the same thing - making a version of your product publicly available, or pushing specific pieces of functionality out to your *customers* or *users*. Developers will also need to make *internal releases* so that functionality can be tested by the team before it is declared fit to release to your customers.
- **Maintenance** happens after the initial project to create the software has come to an end. Once a product is live and being used by customers, it needs to be maintained to ensure that it continues to deliver service consistently and to a high standard. Things can go wrong or break and the technological landscape may even change, as we discussed in Chapter 2, so the period *after* building your initial product may be quite eventful too!

When you decide to build new functionality, or to update your product, the cycle will begin again.

According to the Waterfall methodology, the software development life cycle moves through the following stages one-by-one, in order, cascading down like a waterfall until the project is completed, however, Agile projects run through the analysis to release stages *in every single iteration*.

Fig 19. The Waterfall model. The concept stage marks the start of the project and the release stage marks the end, with maintenance following after. Each stage is completed only once within an entire project.

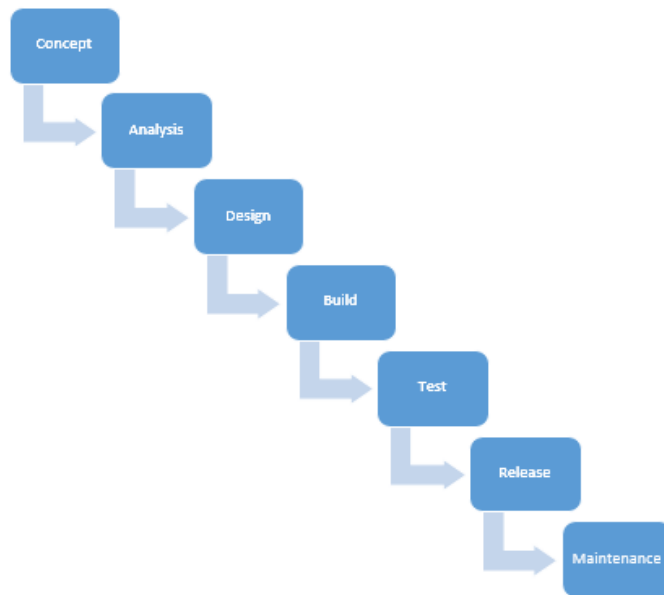
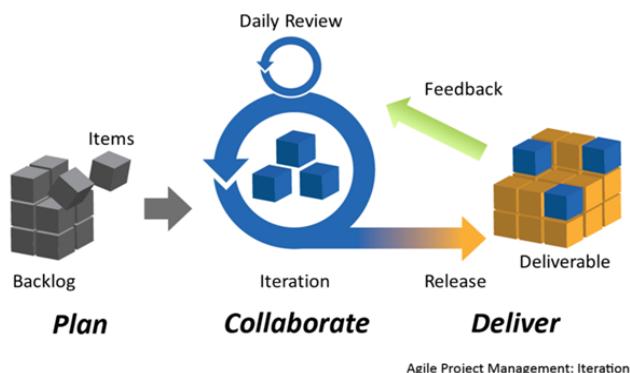


Fig 20. The Agile development cycle. A single iteration includes all the stages from requirements gathering and analysis to release.

https://upload.wikimedia.org/wikipedia/commons/5/50/Agile_Project_Management_by_Planbox.png.
[Aflafla1](#), Iterative development model V2.jpg,



The Agile cycle, and a few sports analogies!

Scrum is named after the Scrum formation in rugby. In Agile teams, professionals with a mix of different technical skills work together and operate as a single unit, instead of being grouped together based on their skills or working on only one stage of the project at a time. The team constantly pass the ball (i.e. the software) back and forth to each other, and they attempt to score; (in other words, to make software releases) often during the course of a project.

The Waterfall process is more like a relay race, with the baton (the software), being passed between different stages and teams once, and crossing the finish line just once during a project. Unfortunately, those whose tasks come towards the end of the race are always under pressure to make up any time lost by those who completed their tasks at an earlier stage.

Individuals on Agile teams can communicate easily and share their specialist knowledge with each other throughout the development cycle. There is a lot of activity happening at once, but the team members provide each other with feedback and take care not to cause delays for other team members. Agile teams are also *self-organising*, which means that teams are, in theory, motivated and able to make decisions about how they will manage themselves and their workload. See Chapters 18, 19, 21 and 22 for information about managing the development process.

Get them done and check them off! Chapter 4 challenges:

- ☐ Spend time getting to know your customers and confirming that your idea is viable *before* you consider hiring technical staff. Revisit Chapters 2 and 3, get your avatar(s), customer profile(s) and customer interview plan together and get as much clarity as you can first.
- ☐ If you're interested in learning more about Agile frameworks, you can find more resources here:
 - The Agile Manifesto. <http://agilemanifesto.org/>
 - Scrum Alliance. <https://www.scrumalliance.org/>
 - Agile Alliance. <https://www.agilealliance.org/>

Download the entire set of chapter challenges for this book, collated into a work book with an activity log to help you keep track of important tasks:

<http://www.mylanderpages.com/donthireasoftwaredeveloperuntilyoureadthisbook/Free-resource-1>

CHAPTER 5

How to identify the skill gaps in your team...and what to do about them

In this chapter:

- The roles that exist in software delivery teams
- Skills shortage assessment
- Project pitfalls

Some time ago, I heard about a woman without a technical background who had created a SaaS product (see Chapter 7 for more information about SaaS applications.) However, it had some quality problems. After listening to the story of how she got started and how the project had been set up, I wasn't surprised. She had one developer and had been hoping that he would direct her, rather than leading the project and knowing for herself what should be done (quite a challenge, I agree, as she had never done anything similar before.)

She had also made limited provisions for technical testing. Creating code and manually testing software are two different job roles, using different sets of skills. Developers do not generally do manual testing as a key part of their work and there are very good reasons why code should *not* be tested by the person who created it! She had achieved an amazing feat, but was now playing catch up.

If you're not aware of the range of skills and expertise that go into creating a professional software product, you won't be able to cover all your bases. How will you know what activities should be happening on your project, why they should be happening, and when?

You might manage for a while - until something that you weren't even aware you needed to do, or pay attention to, comes along and causes a problem.

In Chapter 4 we looked at Agile practices, the *software development cycle* and a lot of terms that will become useful. Now, let's look at the anatomy of a *software delivery team*. Who's involved? What specialist skills do they have? What duties do they usually perform which add value to a software project? Once we've done that, we'll review how to plug the gaps that will exist when you don't have the budget to hire a full team of professionals.

*****END OF SAMPLE*****

You can find the full book, which contains 25 chapters which take you from your initial idea, through to the build, and launch of your product here: <http://mybook.to/Dont-Hire-Software-Developer-Until-ebook>.

SECTION 5

**Don't Buy Software for Your Small Business Until
You Read this Book™ (SAMPLE CHAPTERS: 1 and
2)**

DON'T BUY SOFTWARE FOR YOUR SMALL BUSINESS UNTIL YOU READ THIS BOOK

A GUIDE TO CHOOSING THE RIGHT
SOFTWARE FOR YOUR COMPANY &
ACHIEVING A RAPID RETURN ON YOUR
INVESTMENT

K.N. KUKOYI

Don't Buy Software for Your Small Business Until You Read this Book™

A guide to choosing the right software for your company & achieving a rapid return on your investment.

Author, K.N. Kukoyi

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Don't Buy Software for Your Small Business Until You Read this Book™

A guide to choosing the right software for your company & achieving a rapid return on your investment.

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RESOURCES

There are a number of resources that are provided free with this book. Here's the full list, including links:

1. **Business requirements assessment.** (Chapter 2.)
Word document version and Excel version with MoSCoW prioritisation:
<http://bit.ly/resource1-assessment>.
2. **Total Cost of Ownership budget spreadsheet.** (Chapter 5): <http://bit.ly/resource2-TCO>.
3. **Parking Lot template.** (Chapter 7): <http://bit.ly/resource3-parkinglot>.
4. **Product comparison and shortlist spreadsheet.** (Chapters 7 & 8):
<http://bit.ly/resource4-comparison-shortlist>
5. **Clarification Questions PDF.** (Chapter 8): <http://bit.ly/resource5-clarification>.
6. **Trello boards** that you can copy and adapt for your own use:
www.bit.ly/manage-priorities-online
www.bit.ly/trello-customer-service
7. **Business report:** In their Own Words: *SME Challenges & Trends Survey, 2017*.
The first report of its kind for years, this qualitative survey engaged the directors, CEOs and managers of UK-based SMEs. Discover the frustrations, challenges and successes experienced by businesses like yours in this report about modern business life.
www.bit.ly/report-resource7

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SECTION 1 - CONSIDERATION

CHAPTER 1

Origins

"It is not the strongest or the most intelligent who will survive, but those who can best manage change."

- Charles Darwin

Summer 2006

Wimbledon, London.

We had just said goodbye to the fourth software vendor that had come to present their CRM system to us.

Having shown them to the lifts, our team reconvened to exchange feedback.

What was the verdict so far?

There were the systems that we felt we would outgrow quickly, those that were too rigid and inflexible, the behemoth "oil tanker" products that we feared would drive our business, rather than our business driving them, and a whole host of other eccentricities; and that was just the software!

Then there were the consultants and software vendors.

We saw the full gamut; from the wet-behind-the ears newbies, to the archetypal slick salesmen; sharp-suited, shoes shined, giving perfectly polished answers to our questions, but whose smiles did not reach their eyes. Having delivered their pitch countless times, they were professional, but nevertheless, were going through the motions.

We were planning an ambitious multi-million pound build / buy combination, intending to integrate the software product that the Agile software delivery team I was part of had designed and built from scratch, with software able to guide us in adopting best-practice standards in customer relationship management.

Despite experiencing every stage of growth and transition you can imagine, our business, (started by two entrepreneurs in the mid '80s) had reached a stage where we had in-house technical experience to draw upon when making technical decisions, and a solid software selection process in place.

Our hybrid product was successfully rolled-out in phases to our business users based in North America, Europe, the Middle-East and Australasia and it received praise from City of London analysts.

Spring 2016

Fast forward 10 years and my company, Purposeful Products had sponsored a business research project based on trends and challenges in the SME sector.

The output was a report called *In Their Own Words*, and in a departure from the usual statistics crunched out for multiple-choice surveys, participants' opinions were captured in the form of quotes.

CEOs, managers, heads of departments and directors were interviewed; all employed by small and medium-sized enterprises with between 5 and 200 employees.

The survey highlighted the challenges faced by SMEs when trying to find suitable software and suppliers to meet their needs.

This group of businesses was a random sample, spanning 11 different industrial sectors, yet the majority had either recently bought, or were planning to buy some form of software in the coming months.

These UK based companies were in the market to buy a range of software solutions including those for email, knowledge management, finance, CRM (Customer Relationship Management), ERP (Enterprise Resource Planning), MIS (Management Information System) and BI (Business Intelligence), often without significant in-house IT expertise or guidance to support their decision making.

Whether you consider it a blessing or a curse, technological innovation is now a part of everyday life, and touches almost every business. Companies are under increasing pressure to keep pace with changes and to maximise the opportunities that it presents. To opt out is to fall behind.

These are some of the comments made by the SMEs that were interviewed:

"Eighteen months ago, we invested in a CRM that turned out to be complete rubbish." CEO, Membership Organisation

"The only thing that keeps us sane is knowing it's not just us going through these [technology related] issues." Director of Marketing, Retail Sales

"At the moment, we're overhauling all our business processes... We're investing in purchasing new systems and keeping up with technological changes." IT Manager, Recruitment Company A

In addition to the level of investment in IT evident amongst the businesses that took part in the survey, there was also frustration stemming from negative experiences with large consultancies and software vendors. Participants felt that these companies did not understand how to work effectively with them.

"Software is a continual challenge...With every project that doesn't go well, I wonder what

could have been done differently. I wonder if they [the consultancies] do the same."
Managing Director, Recruitment Company B

This added an extra layer of complexity to the quest to find the right software and secure a return on the investment made.

Current Trends

Were the findings from the *In Their Own Words* survey unusual?

I don't believe they were.

In fact, they mirror several global trends that have become evident in recent years:

- The *Gartner Group*, the world's leading information technology research firm, has reported that businesses without formal or mature IT departments are increasingly making software purchasing decisions without technical advice. This also applies to individual departments within businesses that have their own budgets to spend as they wish.
- Investment in cloud-based services is still increasing, representing a significant change in IT spending patterns.
- Large software companies see SMEs as the next market to tap into, with Deloitte, PwC and other professional service firms developing new products, and collaborating with software suppliers to bring new solutions to the small business software market.

To quote *Accountancy Age*, providers of business and finance news:

"With around 125 million SMEs worldwide, responsible for around 65% of business employment, it's a lucrative space."

Finances Online, a Business to Business directory agree, stating that:

"Small and medium businesses continue to drive SaaS growth fuelled by CRM, business analytics, and storage solutions."

Deriving value from software can be a complex process, and companies attempting to purchase business software without prior experience, or technical counsel face numerous challenges.

To get the best end result, it is important not just to "go through" the software purchasing process, but to *manage* it.

It is essential that anyone purchasing business software understands the wider implications of their decisions, beyond simply finding software that meets immediate needs and preferences.

Why read this book?

Allow me to clarify what I meant when I spoke of *managing* the process a few moments ago.

In addition to researching and identifying products based on their business requirements, purchasers of software may need to evaluate add-ons and extras, and vet (and later coordinate, and monitor) prospective vendors or 3rd party suppliers.

Then there are finance and budgetary implications, the estimating of future growth and scalability requirements, and the coordination of training and change management activities to minimise the disruption that replacing software systems can bring.

There will also be contracts to review and negotiate, industry rules and business regulations to contemplate, security, storage of data, and other matters to consider... and the responsibility for achieving a return on the investment made!

Not only is there a lot to consider, but it is a sign of the times that these decisions now need to be made more frequently.

Today, companies both large and small are playing an inescapable game of catch-up to keep pace with technological advances. Even the smallest businesses have several types of software in place, and the cycle of continually replacing and upgrading systems and acquiring increasingly more advanced tools has already begun.

Would you agree that understanding how to buy software that delivers the desired results has become an important business skill?

Ten years on from sitting on my first software selection panel, information on how to navigate the software purchasing minefield is *still* not widely available. My interviews with SMEs confirm that this remains a risky, expensive and challenging process.

Depending on the size of your business, you may not have a project management function to track, manage and hold all the parties involved accountable, an experienced IT function to guide you in IT strategy, a legal, or procurement function to manage tenders, review paperwork and negotiate terms, or business analysts to gather requirements, review and document your business processes, research the options available and present the facts to you, so you can make an informed decision!

The objective of this book is to ensure that software purchasing projects are set up for success. Making well-informed decisions will enable buyers to gain the maximum benefit from the products purchased, even if they do not have access to any of the aforementioned resources.

As someone who has been hired to work on projects after the first (or even second) attempt has gone wrong, and to work in teams formed to replace software that businesses can no longer tolerate, I have gained a lot of insight into the mistakes that businesses make and the *buyer's remorse* faced once problems start to surface!

As you read through this book, I will explain the points at which the software selection

process can go wrong, and the preventative measures that you can take. We'll discuss a range of tips, techniques, and methods to avoid the pitfalls that businesses encounter, and the mistakes commonly made during the software purchasing process.

You can follow the information in each chapter step-by-step, or select from the tools and tips provided as you see fit.

Who am I?

I began my IT Career in 2004 and since then have worked on a number of multi-million pound projects to create, implement and integrate software, including websites, online software applications and mobile apps.

My experience spans across business, as well as “tech”, including: software delivery, business analysis, process mapping, market research and product development.

I have researched and recommended off-the-shelf products, written business cases for the purchase of new software, and project managed the delivery of products purchased from suppliers, as well as software built from scratch whilst following *Agile* principles.

My consultancy, Purposeful Products supports small businesses in managing software and process-related challenges.

Having led and worked in teams that build software for clients, sat on committees and panels to select software products, and managed 3rd party relationships with software suppliers on behalf of clients, I appreciate the challenges that businesses face when choosing and rolling out new software systems.

This is my third book for entrepreneurs and small businesses.

In my experience, the most common issues and complaints with software are that it:

- Is found to be missing important features. Unfortunately, this means that the purchasing process will need to be repeated in the short to medium term.
- Ticks the right boxes “on paper,” but in practice is difficult, or time-consuming to understand, or operate.
- Does not complete tasks or processes to a high enough standard, or execute them in the specific ways that the business wants.
- Does not meet essential criteria relating to security, performance, auditing, reliability or other similar requirements.
- Does not help your business to meet legal or regulatory requirements, leaving the business open to fines, sanctions or even legal action.
- Is incompatible with other software systems that are in use, and will not integrate with them.
- Cannot actually be purchased because of internal opposition, or disagreements!

I will explain the reasoning you may wish to apply as you search for software that meets your needs, and I'll give you the IT insider's view, highlighting important details that

suppliers may not be eager to divulge.

What topics will be covered in this book?

Here's what will be covered and where you will be able to find the information:

In Chapter 2, you'll find a **business requirements assessment** and several tools to help you clarify what you need your software to do, and to prioritise functionality. This stage of the process is critical, and has many pitfalls - I'll point these out to you as we go along.

Is it best to **build, lease or buy software?**

Should you buy **enterprise software** or a **SaaS (Software as a Service) solution?**

When should you choose the **public cloud vs. the private cloud** and **hosted vs. self-hosted options?**

In addition to this, what kind of **software licensing options** exist?

We will review each option in turn, along with the relevant advantages and disadvantages, and key points to consider in Chapters 3 and 4.

Companies are often unaware of the **hidden costs, add-ons and extras** that can come with buying new software, so we'll talk about putting together a budget, and we'll explore the **true** cost of purchasing your software in Chapter 5.

Business legislation and regulations can affect the choice of software that you can reasonably consider. You will find information about this in Chapter 6, along with resources and guidance documents to help businesses improve their IT Security, and protect themselves and their customers against fraud.

You will also notice that additional information is provided in the **Ask the Expert** commentary boxes. This information has been provided to shed light on some of the topics we will be covering from the perspective of a legal professional - always useful when considering commercial contracts and IT law!

In Chapter 7, we'll discuss **6 steps** to consider when carrying out **product research**, and the key things to look out for when reviewing the software available on the open market.

Due diligence is important, and this should include vetting both products *and* service providers. It is important to choose a supplier whose terms do not restrict you unfairly, and can deliver a high standard of service. Asking the right questions when speaking to consultancies, 3rd party suppliers and software vendors, is crucial. The questions, tips and resources provided in Chapters 8 and 9 have been provided to assist you with these matters.

In Chapter 10, we'll discuss some simple **project management** and **risk management techniques** that will help you manage risks and prevent issues from arising, or escalating, and at the end of the book you will find a list of free and low-cost software products suitable for SMEs.

I promised to provide you with information about ways to get a **solid return on your**

investment, (ROI) as quickly as possible, and I intend to deliver!

Your chances of achieving a good ROI improve or decline with every decision you make, starting with your initial research, so we'll review some important considerations that businesses tend to overlook.

Complementary spreadsheets and templates have also been provided for your convenience. You will find them in the relevant chapters, and in the Resources section at the start of this book.

You can contact me with questions and feedback at:

hello@purposefulgroup.com

<http://www.purposefulgroup.com/contact-us.html>.

With my best wishes,
K.N. Kukoyi

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CHAPTER 2

Laying the foundations: identifying priorities and avoiding pitfalls

“Things which matter most must never be at the mercy of things which matter least.”

— Johann Wolfgang von Goethe

Have you ever heard friends or colleagues complain about the terrible software they are forced to use at work?

The story is often the same: no-one understands how to use it properly, it's terribly slow, doesn't do what it should, or the steps required to complete tasks have been arranged in such an illogical manner, that the sanity of the people that built it is frequently called into question!

In many businesses, there is an active grapevine between current and former employees. Is this something that you have experienced?

Everything is dissected, from the pros and cons of the “old” office environment vs. the “new”, to the quality of the computer systems offered by employers. Staff, recognising the value of the systems in place compare notes, wary of employers known to use poor-quality software applications.

No-one sets out to choose a product that becomes a burden to the organisation or department that uses it, or has the power to scare off new recruits - so how does this happen?

We'll explore the reasons in this chapter, and if you complete the exercises provided, you will have a set of prioritised software requirements that can be used to benchmark any products that you might consider purchasing.

Get clarity on what the criteria for a pass, or fail will be, so that you are guided towards tools that will be an asset, and not a liability. Give this stage of the process the attention it deserves and you will reap the benefits.

Once you have established the features and criteria that are important to you as a business, these requirements will act as a compass of sorts to steer you in the right direction. They can also be handed off to a project manager, agency, software house or consultancy for further discussion.

Let's get back to looking at why companies end up with poor quality software.

What goes wrong during the software selection process?

Mistakes made early in the software selection process can cause plans to stall, or fail, and may damage your chances of achieving a return on your investment. Common errors include:

Failing to allocate sufficient thinking time to the process, and not asking enough of the right questions.

This applies to the questions that your business or department *asks of itself*, as well as the questions asked of the companies competing to supply your software.

When internal requirements are not reviewed in enough detail and criteria are not tight enough, software that should never have made it onto your shortlist will appear suitable.

Without a thorough review of your processes and requirements, certain products may seem appropriate when considered at face value, and it may not be obvious which ones will be best for you. This is often where problems begin.

Not having a clear plan.

Replacing or upgrading software is a project and should be treated as such.

This means preparing:

1. Written selection criteria that describe your requirements and what you want to achieve.
2. A method for benchmarking products, so you can draw comparisons between products.
3. A selection process that outlines the steps you will take to reach your goal.
4. A system for tracking potential and actual costs and expenses relating to the software.

This doesn't have to be painful - I have provided templates that you can use throughout this book - look out for the download links.

We will address point 1 in this chapter, and you will find information to support you with points 2, 3 and 4 in Chapters 5 to 8.

Project pitfall

Don't go shopping without a "shopping list"!

Being in the market for software without quality selection criteria is much the same as shopping without a list - you risk coming away with all manner of non-essentials that seem like a good idea at the time. However, you may forget critical items that should have been a priority.

Not vetting, or considering the supplier as well as the product.

Understanding the capability of the supplier to deliver their services, the range of services offered, and the disadvantages and limitations of these services is also important before you proceed.

Avoid products or suppliers that will pull you out of alignment with your goals.

Service providers should be responsive and able to meet your needs in terms of compliance, security and management of your data, among other tasks and you may well become reliant upon 3rd parties to perform these activities for you.

If you love a product, but have concerns about the provider of the service, proceeding may be risky unless you can obtain the product from another supplier.

Allowing singular modes of thinking to drive the selection process.

Cover your bases by including people who will consider the big picture and those who will pick up on important details during the software selection process.

If you have too much emphasis on big picture thinking, the vision may be clear, but the details of how to reach it, or what is needed to reach it may be missing.

In contrast, too much focus on particular functionality, or specific details will lead to decisions being made based on these items, to the exclusion of other essential characteristics that a product or vendor should have.

The wider implications for the *entire* business with respect to matters such as security, contractual agreements and compliance must not be overlooked.

In order to make the best decisions, you will need to consider both.

Underutilising the skills and expertise of staff.

Inclusion does not mean letting others make decisions for you, but it *should* lead to the selection of a quality product.

The involvement of additional people is sometimes avoided because “decision by committee” can be challenging - but this *can* work well.

A committee, selection panel or forum that represents a range of interests and priorities also shows that efforts are being made to consult others, and will help you make well-informed decisions.

Draw on the assets you have available, because the knowledge, skills and perspectives of your staff can be excellent resources!

Involve the people who use the current software on a regular basis and understand the processes well, and allow them to help you reach the right conclusions.

Consider every team, department or person who will be investing in, using, supporting, or benefitting from the software as a stakeholder, (and consult with your legal, finance, security and compliance teams if you have access to these resources.)

The importance of winning “hearts and minds” is not appreciated.

Your personal style will also have an impact on the project.

If you’re a very “task oriented” person, it can be easy to overlook the fact that *people* will play a huge role in your business obtaining a good return on its investment.

If people feel excluded, do not feel heard, or fear that important items are being overlooked, you may face internal struggles and resistance to your plans.

Non-cooperation may come in many forms - objections, lacklustre performance, obstructive behaviour, refusal to contribute to the funding of the software required, or withdrawing or withholding support that would be beneficial to the project.

Even if you are in a position of authority, remember that other people can still make your goals harder to accomplish.

Additionally, people who feel that they have no stake in the process will be less enthusiastic and motivated about your proposals.

An appreciation of *why* new tools are needed, *why* this is a positive event and *how* the business, and staff at all levels of your organisation will benefit is important if you value the support, goodwill and cooperation of your colleagues.

Change can be very disorientating for some people, and you may need to handle the

reactions that can arise in response to it. In particular:

- Fear of the unknown. *Why is this happening? This could be a disaster!*
- Fear of losing existing, familiar tools and processes. *This works fine, why change anything? Will the new software do X, Y and Z for us? If it doesn't, I am not going to support this!*
- Demoralisation / demotivation may accompany the perception that changes have been introduced without warning. *No-one asked me! All I do is work here, why would my opinion matter?!*

How damaging do you think these modes of thinking might be to your project?

Although you may disagree with these attitudes, be vigilant, consider what people within your business are saying and be prepared to address issues and deal with any concerns and negativity relating to your proposals. It is in your best interest to do so!

Not making tough calls when necessary.

On the other hand, there *will* be some hard decisions to make, and it will be difficult to select the right product if you get bogged down in trying to please everyone!

If you have considered the different needs of your business, then you will be best placed to make a judgement call, bearing all the relevant points in mind.

Some evaluation and prioritisation techniques appear later in this chapter to assist you when making difficult choices.

Businesses also get “caught out” by *unknown unknowns*, things they aren't even *aware* are important, due to a lack of experience with purchasing software.

Therefore, in Chapter 8, we'll run through a set of questions that you can ask software vendors and service providers.

* * *

Gathering your written selection criteria

Begin with the end in mind!

Habit #2 in Stephen R. Covey's book, *The 7 Habits of Highly Effective People* is an excellent mantra to consider during the software selection process. A review of your business and its objectives is an important activity to undertake before going out to market to look for a new product. Consider the following questions:

- *What is driving you to consider new business tools?*
- *What are the most important problems that you wish to solve, and the benefits that are most worthy of pursuit?*
- *How will you know when you've achieved your objectives?*

Your answers will highlight what you must get back from your investment and why. They

will also help you to verify that your software is producing the expected returns.

In this section, you will find an assessment that I designed for customers. It allows me to gain a deeper understanding of my clients' businesses, and an insight into what each business *really* needs its systems to do.

This assessment will be suitable whether you are buying software for a whole organisation, team, or department. To cover all the bases, it considers big picture strategy, as well as more detailed day-to-day processes. It will also help you to identify your "deal-breakers."

A key factor in achieving ROI is focusing on, and prioritising the right things.

If the product you buy doesn't support you in achieving the goals, and solving the problems that you identified as being important, then you will have bought the wrong software.

Remember that if you consider the questions carefully, and then stick by your criteria, it will become difficult to buy the *wrong* product!

The business requirements assessment covers the following topics:

1. Overview. Where are you now?
2. Tasks and processes
3. Departmental / Team requirements
4. Goals and targets
5. Your customers
6. Risk management
7. Data storage and management
8. Software integration
9. Reporting and analytics
10. Employees and expansion plans
11. Success / failure criteria
12. Identifying your top "must haves" in terms of specific benefits sought... and your deal-breakers.

Delegating tasks

You can complete the assessments and exercises in this book yourself, or hand them over to the people best placed to manage them. Be sure to ask them to really think about the questions that are being asked and to provide detailed responses.

Collecting information and feedback

This information could also be gathered via a series of group workshops or brainstorming sessions that focus on the specific needs of each group, or department and capture all their key requirements and activities.

You may also wish to request feedback using a survey. The following tools will allow you to create a survey for free, or at a very low cost:

SurveyMonkey, <https://www.surveymonkey.co.uk/>.

Typeform, <https://www.typeform.com/pricing/>.

Google Forms, <https://www.google.com/forms/about/>.

SurveyGizmo, <https://www.surveygizmo.com/plans-pricing/>.

I have gathered internal feedback in questionnaire format for clients, and this approach can yield a lot of great insights. However, you will need to nominate someone to collect, analyse and write up the findings.

Before starting, you'll need:

- A digital or paper based method for capturing your thoughts.
- To allocate some uninterrupted concentration time to complete the exercise. Split the assessment across several shorter “power sessions” if it is difficult to find a single block of time to complete it.

Instructions:

- Run through the assessment and note down your answers in the context of the software that you are considering, the challenges you face, and the benefits you are seeking.
- Highlight the questions that need further consideration or investigation, and return to them later. Some may feel more applicable to your organisation than others. In that case, please focus on those that are most relevant.

Bear in mind that the questions that are hardest to answer may be the most important!

You can download a copy of the full business requirements assessment in XLS and Word formats here: <http://bit.ly/resource1-assessment>.

*****END OF SAMPLE*****

You can access the full version of this book here: <http://mybook.to/small-business-software-buyers-guide>.

THANKS FOR READING!

So, what comes next? If you'd like to, you can:

Book a FREE 30 minute consultation session with us:

You can book a free appointment to talk to us via our Calendly appointment booking page:
<https://calendly.com/purposeful-products>.

Connect with us:

Email us with questions (or just to say hi!) at: hello@purposefulgroup.com.

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Our workshops are available under our Tech Startup Academy brand. You can find details of our latest workshops here:

<https://www.eventbrite.co.uk/o/tech-startup-academy-20241732175>

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* * *

Don't Hire a Software Developer Until You Read this Book. The handbook for tech startups & entrepreneurs (from idea, to build, to product launch and everything in between)

A #1 best-seller in multiple business categories and multiple countries including the UK, US, Canada, Brazil and Australia, this is the software survival guide for startups, small businesses and entrepreneurs that want to start, or grow their tech business the smart way.

Learn what you need to know and do to get your software product built and successfully delivered into the hands of your customers.

Amazon reviews for Don't Hire a Software Developer Until You Read this Book

"The only problem with this book is that it didn't come sooner. As an entrepreneur who went through this process blind, I can tell you that this book is a must have for any business in this day and age. This book would have prevented me from several mistakes that cost \$\$\$\$. I recommend that you read this book from cover to cover--an ounce of prevention is worth a pound of cure!"

Ebook & Paperback. Universal link for all countries: <http://myBook.to/Dont-Hire-Software-Developer-Until-ebook>

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Ebook. Universal link for all countries: <http://mybook.to/entrepreneurs-save-time>

* * *

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