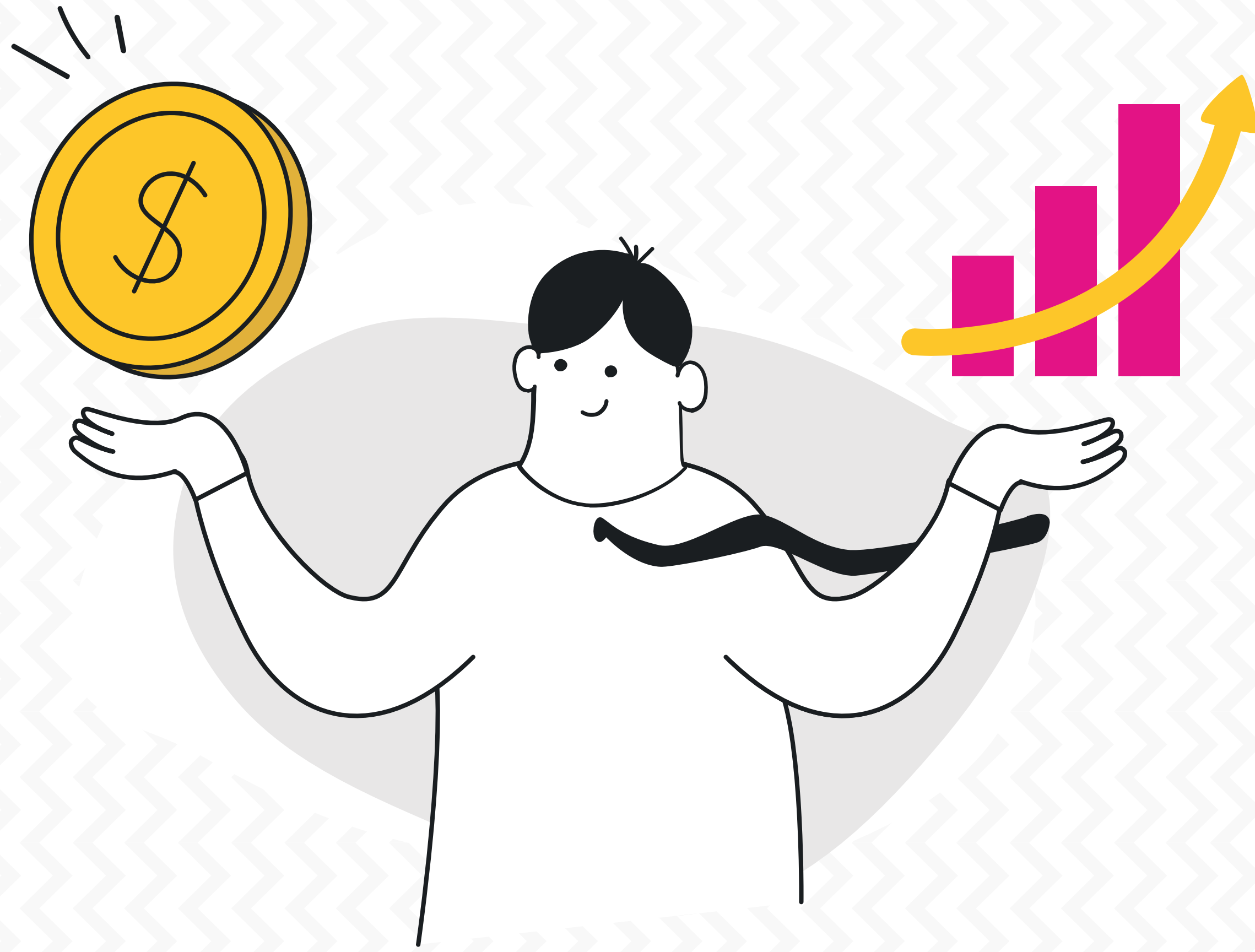




**2025 Marketing company handbook:**  
**Gaining & retaining SMBs**



SMBs are a diverse group with different needs, goals, and operational processes – even within the sector. As a company that’s dedicated to developing technology for this dynamic market, we are committed to keeping up with SMB trends and behaviors, and using them to help marketing companies such as digital agencies, marketing solution providers, search engine specialists, etc., optimize their strategies and approaches when dealing with their SMB clients.

**As 2025 kicks off, we’ve compiled insights from our annual survey of 500 small business owners into a handbook featuring 4 key strategies to shape your SMB roadmap for the year ahead.**

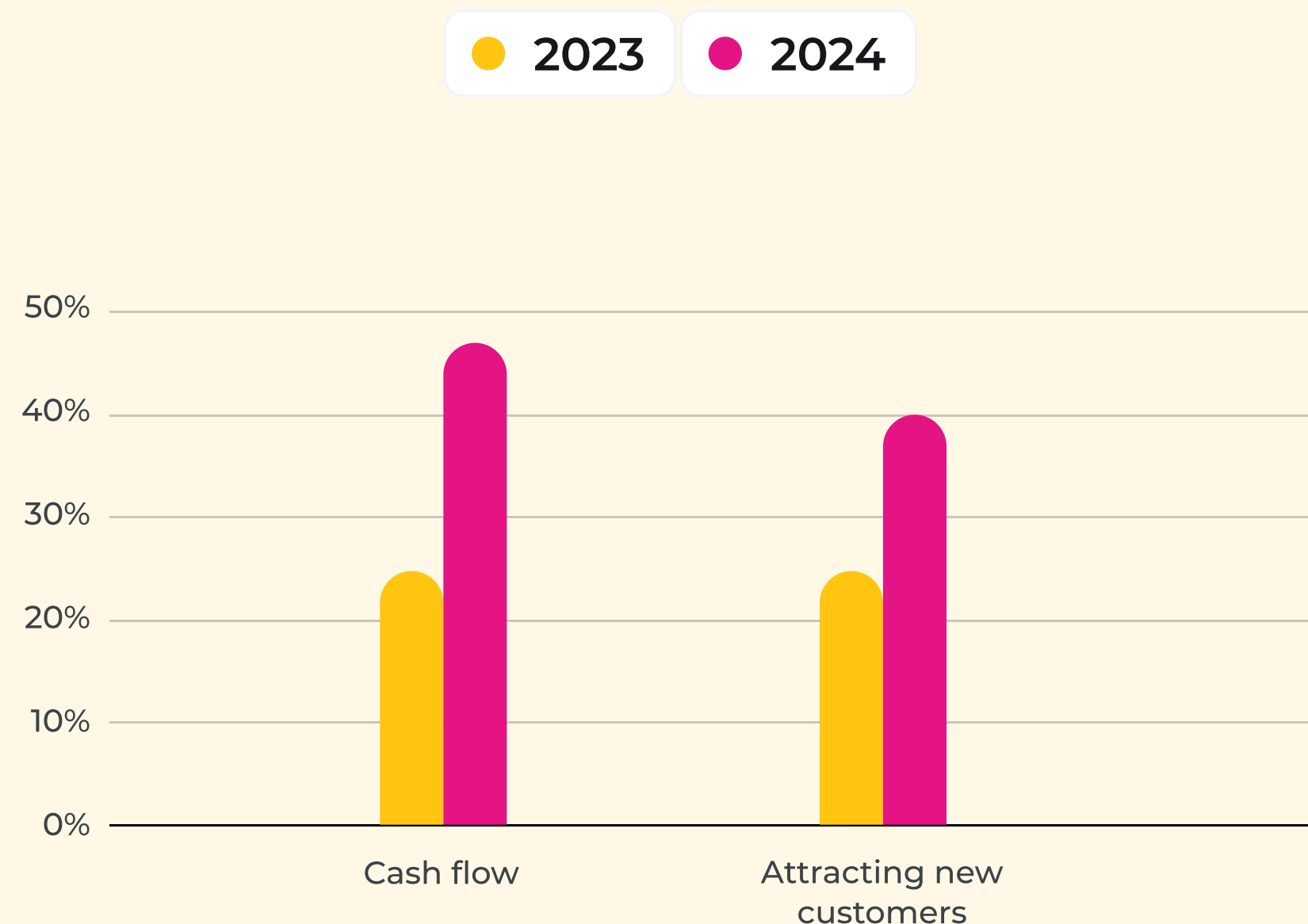
## 1

Our annual survey revealed that 76% of SMBs are using up to 4 digital tools to run their business and **67% of SMBs have added up to 4 new tools to their portfolio this past year alone**, indicating the appetite for digital tools continues to grow. But where are small businesses putting their focus?

Our surveys conducted in both 2023 and 2024 showed that **SMBs' top concern is the ability to manage a healthy and consistent cash flow.**

## Expand your offering in areas SMBs care about most

### Top SMB concerns



• Third top concern for 2024 is finance & time management (28%)

With this knowledge, it's no wonder streamlining invoicing & billing and payment collection were consistently chosen as the top services SMBs look for in digital solutions year after year.

These are also the two areas that small business owners are most willing to automate and apply tools that complete tasks on their behalf such as **invoice creation & sending and payment collection & reminders**. Doing this reduces manual labor and time spent on tedious, time-consuming tasks – something SMBs are in desperate need of.

In addition, it helps them get paid on time so they can invest back into their business.

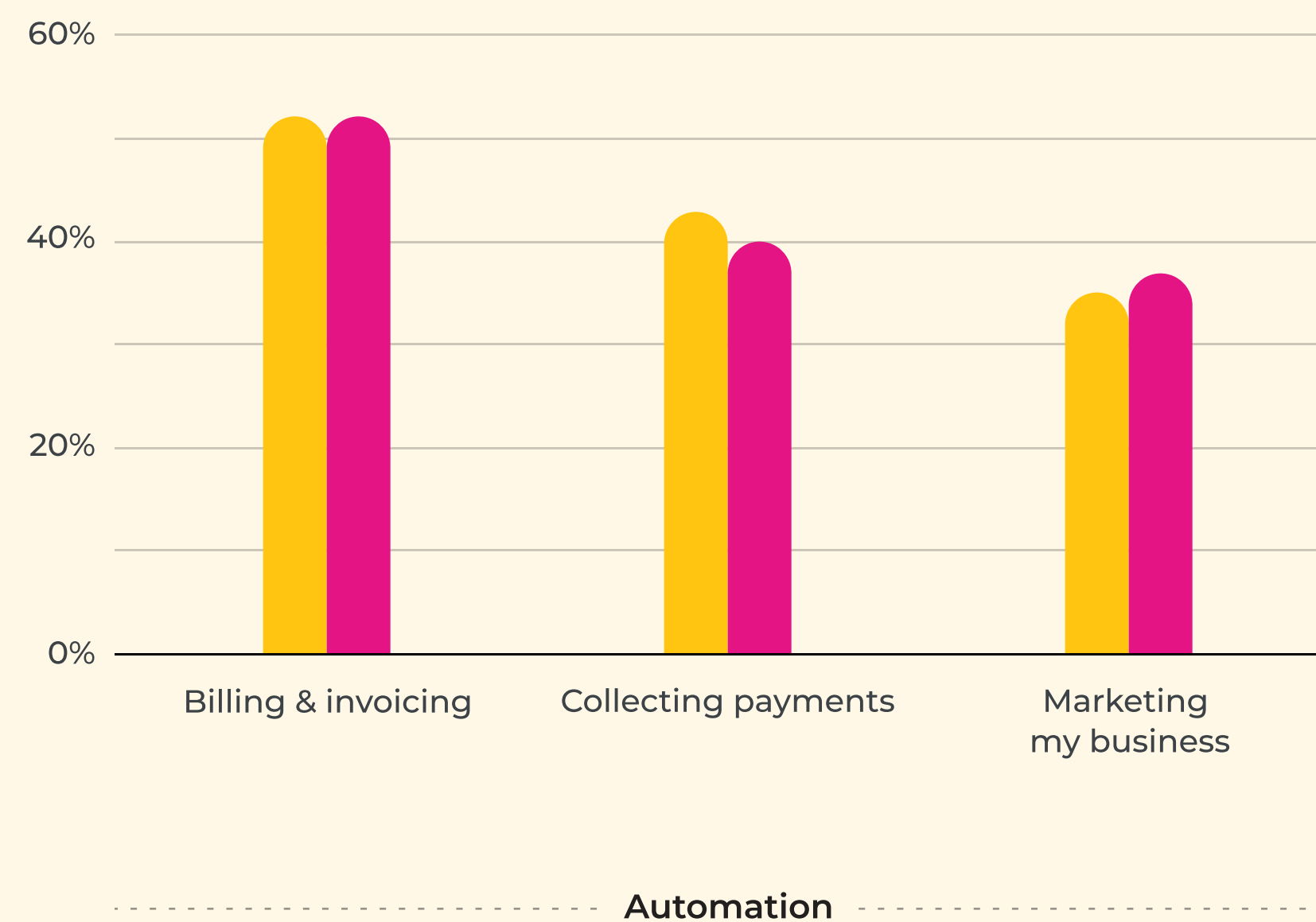
By expanding their SMB offering and including payment facilitation tools,

marketing companies will become a true partner to their SMB clients, showing them they understand their clients needs and can be there and adapt along with them.



### Top 3 automations SMBs use

● 2023 ● 2024





# Case Study: Streamlining payments for SMBs

Here are some examples of how SMBs using platforms with payment facilitation tools were transformed:



1

## Perkins Tax & Accounting Solutions

Perkins Tax Accounting Solutions was using multiple tools to handle things like payments and customer management, which was not user-friendly for their clients and created a bad customer experience. By using an all-in-one platform, Ashley Perkins (owner) offered her clients options such as paying upon booking, or paying after the service was provided, in which an automatic invoice

and reminder was sent. “sophisticated, big-firm resources wrapped in local-firm warmth and responsiveness”.



2

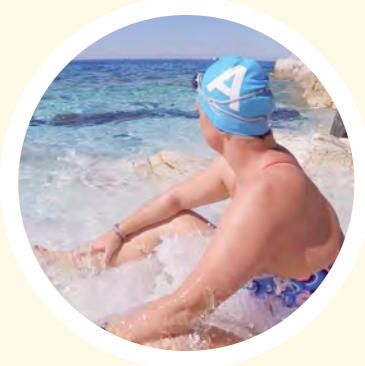
## Get Certified America

Get Certified America quadrupled their sales after starting to work with a complete business management solution. Prior to working with the platform, the company handled all payments manually – that’s hours of work each week! Since using the platform, they have centralized operations and began offering discounts for volume pricing.

When it was all done manually, Get Certified America could only sell one certification test at a time, but the quick process for both the company and its clients allows the business to sell hundreds of tests at a time, increasing their profitability.

## Case Study: Streamlining payments for SMBs

Here are some examples of how SMBs using platforms with payment facilitation tools were transformed:

**3**

**Margarethe Denk**

Margarethe Denk was struggling to keep track of the swimming lessons she was selling to her clients as 25% of her business was sold in packages. She needed a comprehensive CRM that could provide lesson packages online, where clients could easily access and pre-pay for them. Now, her clients can browse all her package options, choose the one that suits their swimming goals, register,

and pre-pay for the package seamlessly and intuitively.

The platform also gives Margarethe full transparency into her cash flow, with reports and data that help her see what is coming in, what's due, and what's overdue, so she can make better business decisions and monitor her income more efficiently.



# 2

**Growing their business remains one of SMBs' top priorities.** While in 2023, only 23% of SMBs marked attracting new customers as their second top concern, in 2024 that number grew to 40%. In addition, business growth jumped from #4 in 2023 to #3 in 2024 on the list of top services SMBs are currently using their digital tools to improve.

Getting noticed by new customers is an important stepping stone in SMBs' journey toward growth.

## Join SMBs' journey to growth

That's why services like SEO, social media advertising, directories and listings are such popular services in this segment.

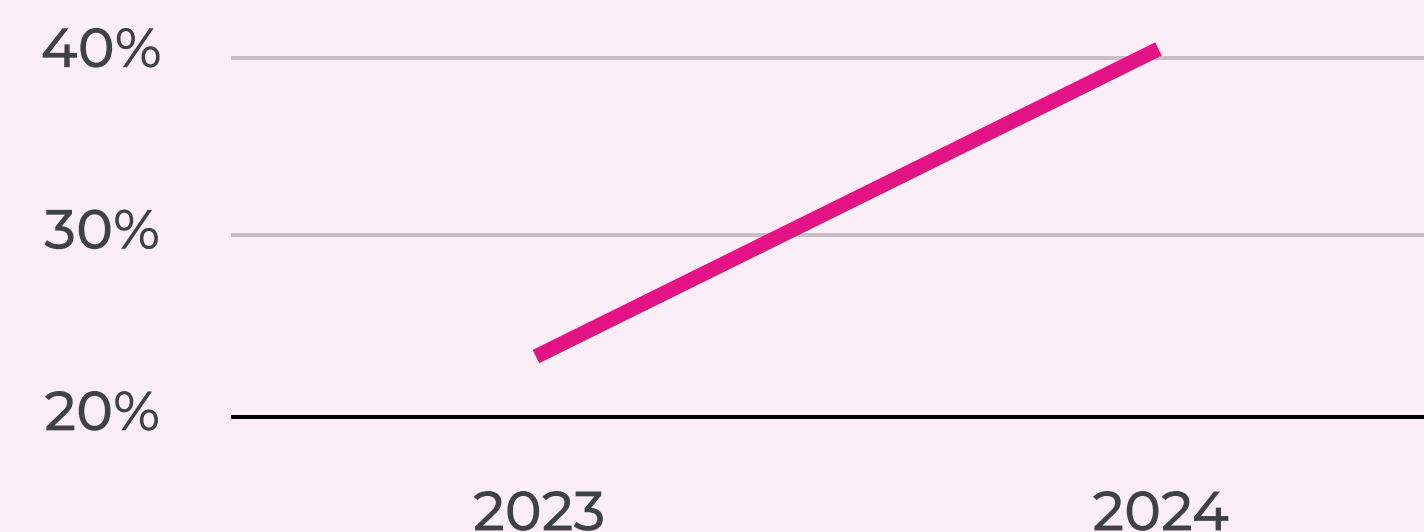
But getting found by leads and turning them into paying customers are two very different things. Becoming a partner in your SMB clients' growth journey by helping them convert leads into closed deals is just as important. In fact, our 2023 survey of SMBs' marketing habits revealed that **of the 70% of SMBs that outsource their marketing, 17% churn because they don't feel the service provider was a true partner.**

Services and tools that help SMBs handle leads with care

and nurture them into long-lasting business relationships are in higher demand and marketing companies that can prove themselves to be

true partners interested in their SMB clients' growth will likely build stronger, more loyal relationships with them.

### Importance of business growth for SMBs



**17%** of SMBs that outsource their marketing churn because they don't feel the service provider was a true partner

## ***Case Study: How a leading marketing agency went from SMB vendor to partner***

**Read the case study below to see an example of an organization that successfully implemented this strategy, becoming a true partner for its SMBs and uncovering new opportunities for growth:**

A leading publicly traded marketing organization serving over 30K SMBs, leverages inTandem's partnership program to go beyond lead generation and play a deeper, more strategic role, in their SMBs' journey toward growth.

Built on inTandem's platform, the agency launched their own branded lead management app, aggregating leads from various marketing channels, and empowering SMBs to respond faster and nurture more leads into paying customers.

As a result, the marketing agency significantly improved their positioning with clients, offering more tangible ROI and standing out with their own branded app.

Furthermore, the agency offered a direct upsell path to a comprehensive business management solution, effectively transitioning clients to a broader set of tools for managing their everyday business tasks, such as client communication, payment collection, and scheduling.

By growing beyond traditional lead generation services and becoming a true partner to their SMB clients' growth, the agency unlocked

higher profit margins through subscriptions and increased ARPA, improved retention, and boosted visibility and loyalty.







# 3

Fifty two percent of respondents in our survey were solopreneurs, and a **majority of the 500 respondents are using up to 8 tools to run their business.** That number highlights the core apps they are using for critical business tasks and doesn't include gmail, social media apps, messenger apps and others.

That means SMBs are using too many apps to run all their business operations, which is time consuming, error prone, involves clunky integration

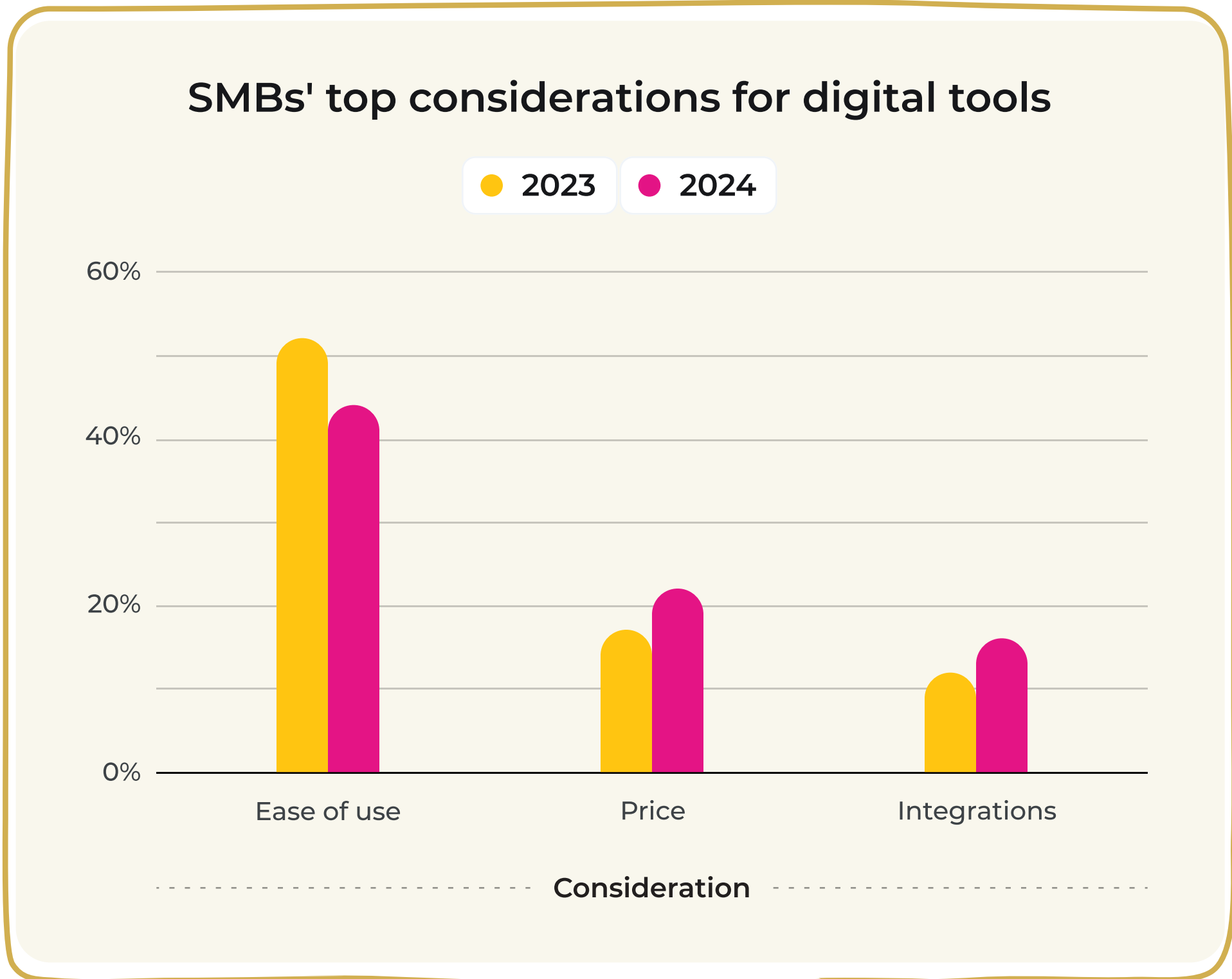
## Consolidate & simplify

processes, and causes app fatigue. When asked if they'd be interested in an all-in-one solution, 91% of respondents responded with an openness to exploring the idea or a

high likelihood of purchasing such a solution, which is consistent with 2023's survey. **Only about 9% were not interested in consolidating their apps.**

More than just consolidating their needs into an all-in-one solution, SMBs are looking for solutions that are simple to adopt. **Ease of use has been the top consideration for SMBs when choosing a digital solution by a landslide for the past 2 years,** beating out price. Small businesses don't have the time to learn a whole new system and they're willing to overlook pricing if the solution is easier and more intuitive to use.

Majority of SMBs are using up to 8 core apps to run their business



## Case Study: Industry leading marketing & sales company meets their SMBs' needs all-in-one

A major US-based digital agency selling fragmented marketing services such as social media management, website building, and text & email marketing was experiencing high rates of churn and hitting a ceiling when it came to their revenue potential.

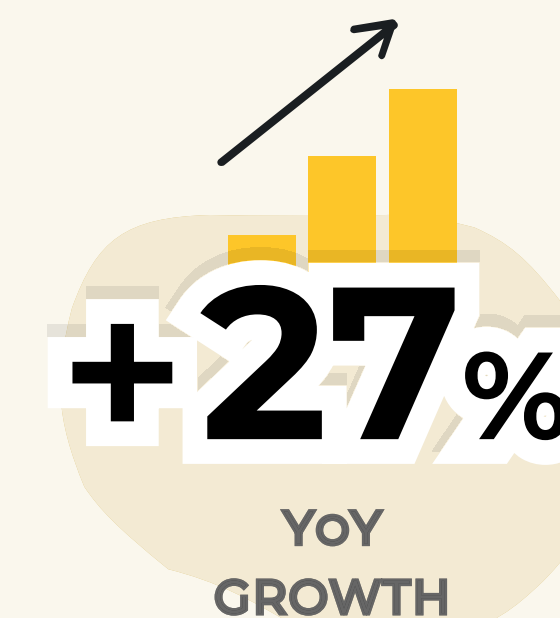
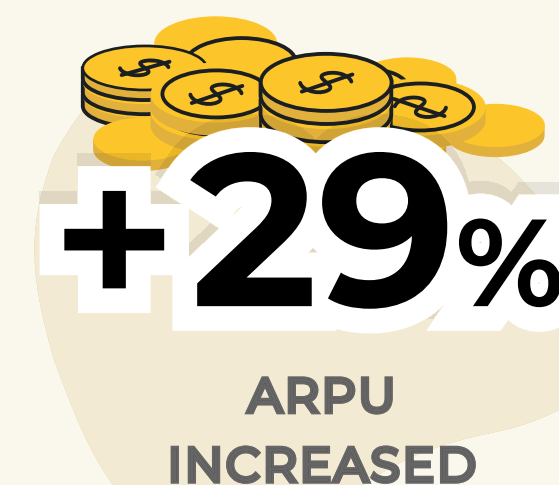
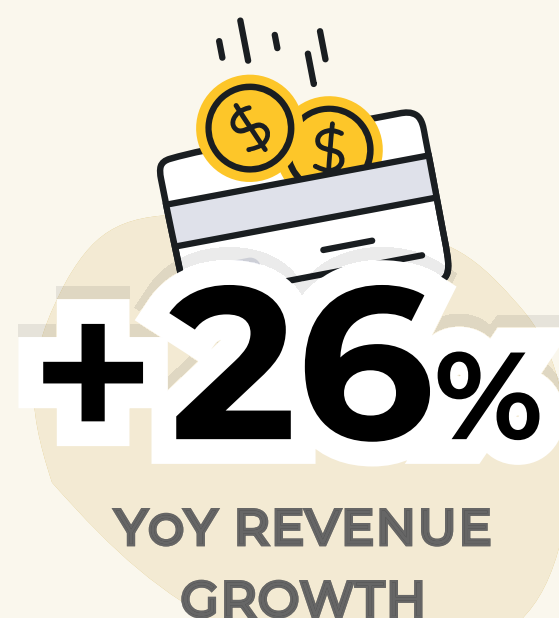
They understood that they needed to meet their SMB clients' needs on a higher level and ingrain themselves into their clients' daily operations.

The agency decided to go-to-market with inTandem by vcita's complete business management solution that notifies their small business

clients in real-time about incoming leads and allows them to manage their entire business & sales cycle; from appointment scheduling to payment collection. By partnering with a white-label solution such as ours, they became a successful SaaS agency, offering their digital and lead generation services together with custom-developed solutions, all-in-one.

The results? A partnership that fundamentally changed the way the agency positioned itself, as they became an all-encompassing business platform for SMBs. Their ability to consolidate apps for their small business clients, without compromising the level of service they provide made them a go-to for SMBs

looking to grow and run their business. The agency enjoyed a 26% increase in revenue growth, reduced churn, and a boost in customer loyalty by allowing their SMBs to fully operate and automate their day-to-day work through a single, branded platform.

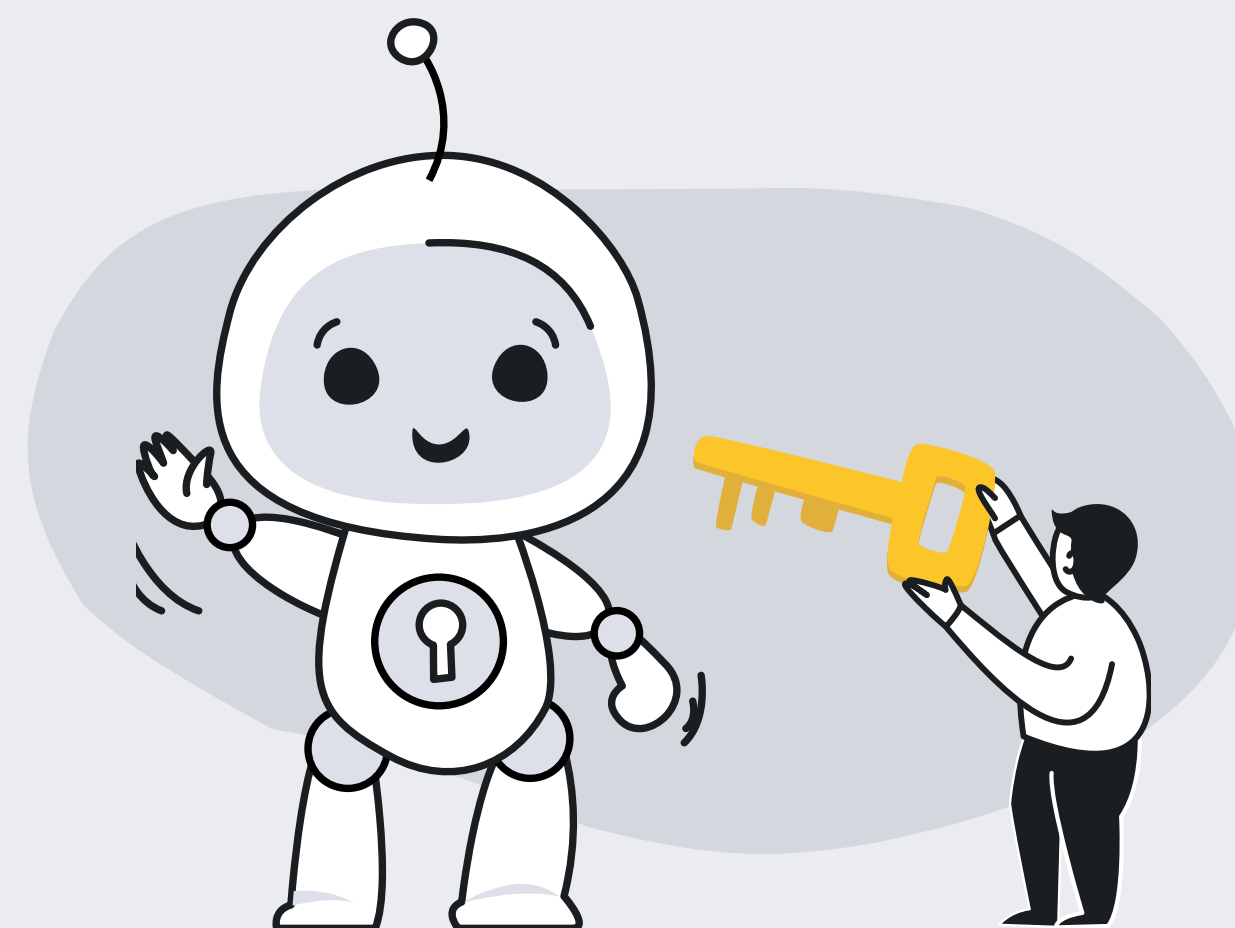


4

## Be part of the AI revolution

AI is becoming increasingly significant to small business success. Though about 70% of SMBs are still not using AI to better their business, **39% expressed a profound interest in beginning to use the technology within the next year.** Currently, only 28% of SMBs have no interest in using AI for their business.

When those 28% were asked why they don't use AI, lack of knowledge in the field was the main reason. This has evolved from 2023, in which most SMBs felt it wouldn't help their business, demonstrating the shift in attitudes towards AI to where **SMBs now cannot shy away from how it can be an asset to their business, but may not have the tools and resources to implement it.**



### Top reasons for SMBs not using AI

2023

31%

*I don't feel it would help my business*

30%

*I don't understand how to use AI*

14%

*Learning curve*

2024

36%

*I don't understand how to use it*

26%

*Price*

25%

*I don't feel it would help my business*

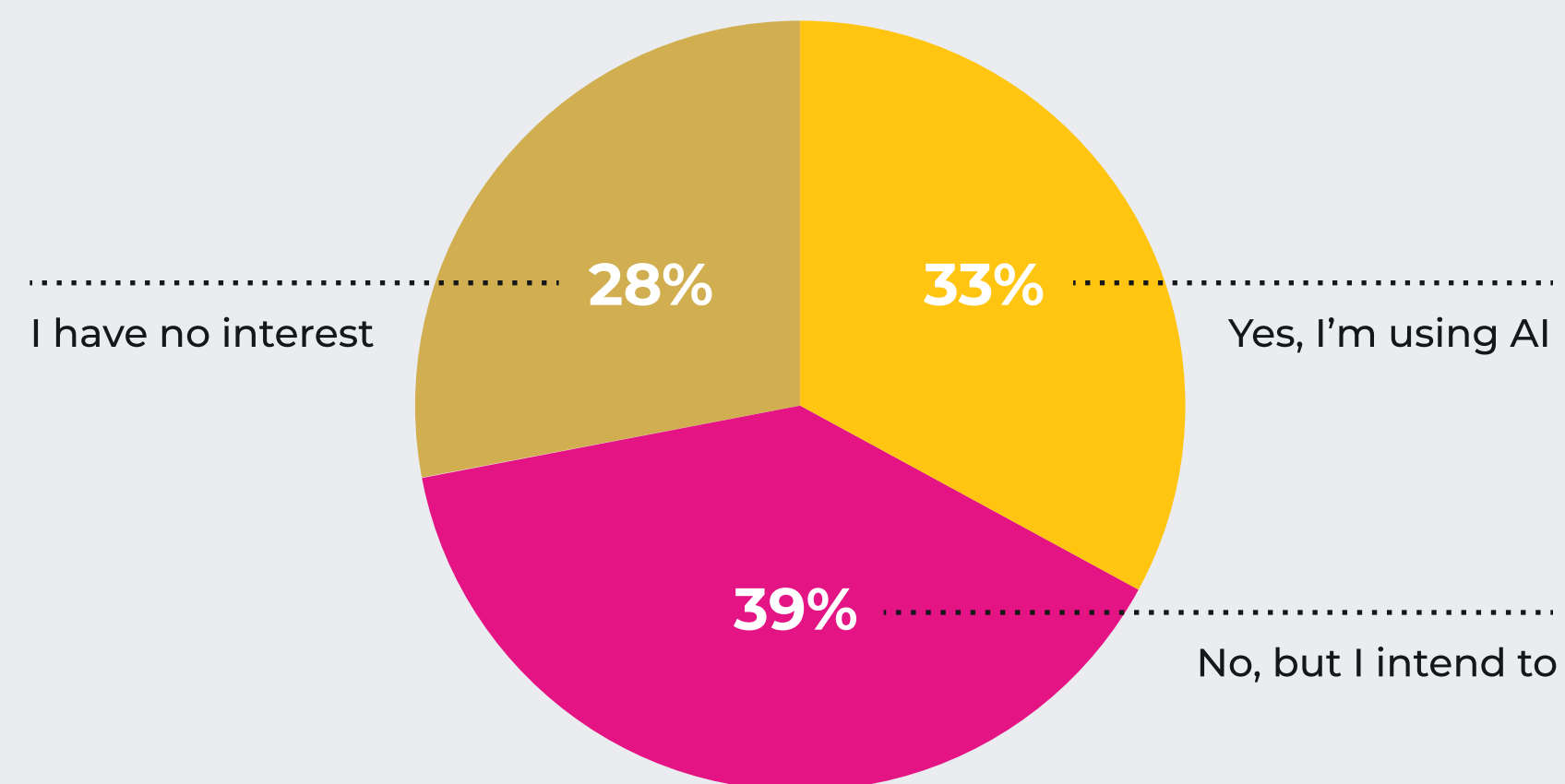


But a lack of education isn't the only barrier to successful adoption of AI for SMBs. Our survey indicated that **only 25% of respondents would be comfortable with embedding AI tools in their business to automate tasks**, even though 51% believe that's what an AI tool should do. Sixty one percent would prefer to have some sort of control over using AI tools in their processes, and **32% would want full control over the AI-driven actions before they are executed**. These segments, along with the 29% of SMBs that prefer to test out the tool before giving it full autonomy, represent the skepticism that SMBs have towards using AI in their business – they don't fully understand and trust the technology.

**SMB-serving organizations are perfectly positioned and have a great opportunity** to bring AI solutions to their SMB clients and help them compete with their larger counterparts. Integrating the AI solutions into their SMB clients' daily workflows and

educating them on how to successfully implement these tools into their operations, including the ROI of using this tech, will help SMB service providers become part of the AI revolution that will shape the future of SMBs.

### Are SMBs using AI in 2024?



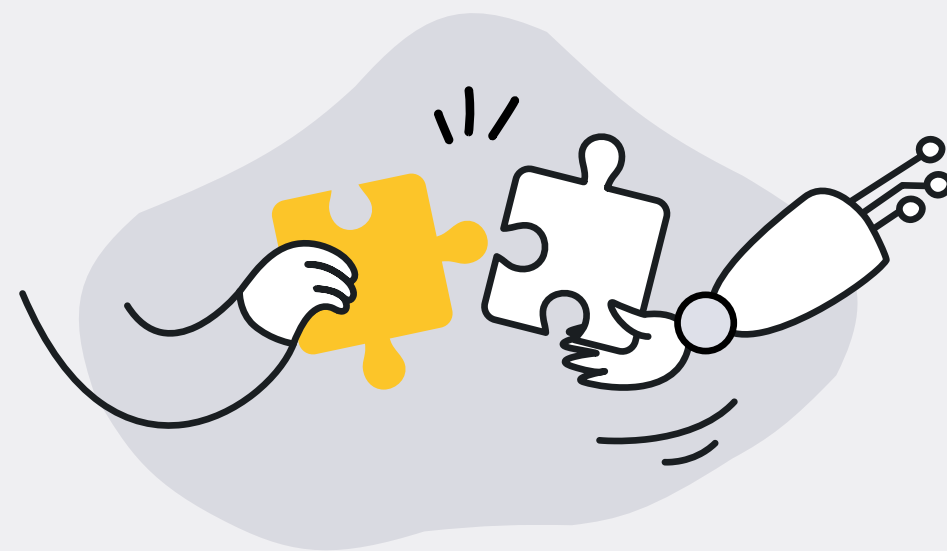
## Case Study: How inTandem makes AI impactful for SMBs

This case study covers AI's immediate impact on SMBs and how small businesses can leverage such powerful technology to better their operations & service, and even optimize their pricing:

Over the past couple of years, inTandem has been experimenting with how to make AI the most impactful for SMBs. We realized that, for small business owners who mostly run the show on their own, getting assistance in the form of business advice could prove most valuable. We also understood that, in order to get more SMBs to adopt the AI technology, we need to make it accessible, easy-to-use, and simple to implement.

We embedded our AI-powered business assistant: BizAI, directly into our platform, instead of making

it another platform or tool the SMB needs to learn. By doing this, we lessened the learning curve, but also reassured the small business that they could continue to trust the platform throughout its evolution.



The results worked wonders for many SMB owners. Almost 80% of our users deemed BizAI very or extremely helpful for their

business. Considering the skepticism indicated earlier from our end-of-year survey, that number speaks for how AI can become an integral part of running a small business. In fact, one of our users, an SMB solopreneur in the coaching field, used BizAI to check her pricing against her competitors. Since the AI-driven assistant was integrated into the business management platform, it already knew her pricing, services, line of work, and location. All she had to do was ask BizAI to 'Compare my pricing to my competitors', and in a matter

of seconds, she learned that her pricing was on the lower end. "I increased my pricing and the last two clients didn't even skip a beat, they signed up right away!" She was able to see a great uptick in her revenue immediately after using BizAI – that's the impact you want to make on your SMBs.

**80%** of BizAI users found it very or extremely helpful for their business

## Get more from your SMBs with these strategies

SMBs are looking for tools that will help them manage their cash flow and payments, prioritize business growth, and compete with their larger counterparts. Considering the trust they already instill in their service providers, marketing companies serving this demographic are perfectly positioned to deliver the value and benefits their SMB clients deserve.

By expanding their solution in areas SMBs care about most, assisting in locking down more customers for their clients, delivering much-needed AI tools that are integrated into daily workflows, and reducing SMBs' need to switch between so many apps,

marketing companies can increase their revenue, boost customer engagement, and reduce churn.

The strategies included in this handbook are useful for any marketing company to implement into their SMB approach for 2025. The data we collected from our end-of-year survey of 500 small business owners along with our insights from over a decade of serving this diverse market and cultivating successful partnerships will make for a comprehensive strategy that covers everything SMBs need and want.

inTandem by vcita is an SMB technology platform designed to serve the needs

of SMB service providers. Marketing companies that serve the SMB market can partner with inTandem to expand their proposition and provide their clients with tools to increase productivity, grow revenues, and manage their finances. With hundreds of thousands of SMB users worldwide, and partnerships with marketing agencies, publishing companies, media outlets, and more, inTandem delivers an innovative digital platform that helps organizations engage their SMB customers, increase retention, grow brand awareness, and develop new revenue opportunities.



### Want to become an inTandem partner?

[Contact us](#)

 inTandem

To learn more about inTandem's partnership program, visit us at:

[intandem.vcita.com](https://intandem.vcita.com)

