K2's Advanced Collaboration Solutions

Major Topics

- Enhanced Portals for Collaboration: Including PBC and 1040 workpaper integration
- Modern Payment Solutions: Understanding and integrating various payment options into your portal
- Effective Use of eSignatures: Streamlining processes and ensuring compliance
- Feature Checklist for Collaboration Tools: What to look for in the latest technology

Learning Objectives

- Evaluate and select portal products that include PBC and 1040 workpaper functionalities
- Compare different vendor options for integrating payment processes
- Assess eSignature needs and the features that best address them
- Develop a comprehensive understanding of the features necessary for effective collaboration

Think About End-to-End Experience

- How do you collaborate?
- What role do portals play?
- How does the ease of gathering documents (PBC) help?
- What about integration into your applications?
- How about delivery of work products or invoices?
- Is it easy for you to get paid?
- How do you get sign off effectively?
- All of these are topics for you to consider and for this session

Set Your Goals

- Ease of use – Best
- Collaboration - Helpful
- Security – Must
- Seamless email – integrates with portals and other systems
- eSignature – Convenient
- Transparency – Open
- Client Relationships – Honest
- Utilization – Reasonable
- Realization – Fair
- = Team member productivity and experience

What Does Collaboration Mean?

People View

- Real-time co-editing?
- Working with clients on projects?
- Coordinating and managing your team?
- Group meetings?
- Workflow including scheduling and monitoring projects?
- Customer and client support?

System View

- Multiple users in a system of record?
- Overall security concerns (DLP and the use of document classifications)
- Shared productivity software (Microsoft 365, Zoho One, Google Workplace, Adobe Creative Cloud/DC/Spark)?

Top Collaborative Tools

- **Microsoft Teams/Microsoft 365**: A communication and collaboration platform that offers chat, video meetings, file storage, and app integration
- **Zoho One:** A collection of cloud-based productivity and collaboration tools, including email, Zoho Drive, productivity software, CRM, and Zoho Books, all part of a suite of 60+ applications
- **Google Workspace (previously G Suite):** A collection of cloud-based productivity and collaboration tools, including Gmail, Google Drive, Google Docs, Google Sheets, Google Slides, and Google Meet
- **Zoom**: A video conferencing solution that enables remote meetings, webinars, and real-time collaboration with screen sharing and breakout rooms
- **Slack**: A popular instant messaging platform that allows team communication and collaboration with file sharing and third-party app integrations
- **Trello**: A project management tool that utilizes boards, lists, and cards to organize tasks and collaborate with team members
- **Asana**: A work management platform for teams to plan, organize, and track work progress, providing visibility into projects and tasks
- **Basecamp**: A project management and team collaboration tool that offers to-do lists, file storage, messaging, and scheduling features
- **Monday.com**: A work operating system (Work OS) that enables teams to manage projects, workflows, and collaboration through customizable templates and integrations
- **ClickUp**: A productivity platform that combines project management, time tracking, and goal setting, allowing teams to collaborate and stay organized
- **Confluence**: A content collaboration tool designed by Atlassian that allows teams to create, organize, and share knowledge

Top Portal Tools

- **Microsoft SharePoint**: A document management and collaboration platform that can be configured as an intranet or extranet portal, providing access to shared resources and collaborative tools
- **Zoho Creator**: A low-code application development platform that allows businesses to build custom portal applications for internal and external users
- **Salesforce Customer Portal**: A customizable portal solution that integrates with the Salesforce CRM platform, allowing businesses to provide a personalized experience for their customers
- **Zendesk Guide**: A knowledge base and self-service portal that integrates with Zendesk's suite of customer support tools, enabling customers to access information and request support
- **Client Portal**: A WordPress plugin that enables businesses to create a secure, branded client portal for file sharing, invoicing, and communication
- **Onehub**: A cloud-based file sharing and collaboration platform that offers secure client portals for businesses to share files, manage permissions, and collaborate with external users
- **Igloo**: A digital workplace solution that includes intranet, extranet, and client portal capabilities, enabling businesses to share information, collaborate, and manage workflows
- **Clinked**: A cloud-based client portal and collaboration tool that offers file sharing, project management, and social collaboration features for businesses and their clients
- **SuiteDash**: An integrated software platform that combines client portal, project management, CRM, and invoicing tools, enabling businesses to manage client relationships and collaborate effectively
- **Huddle**: A secure collaboration platform that provides file sharing, project management, and client portal features for teams and organizations

Top Portal Tools For CPA Firms

- **Liscio**: A platform that combines an easy-to-use client portal with eSignature, plus gathering and delivery of documents
- **SmartVault**: A secure document management and client portal solution that integrates with accounting software, such as QuickBooks and Xero, offering file sharing, e-signature capabilities, and workflow automation for CPA firms
- **Suralink**: A platform that combines a secure client portal with workflow management tools, specifically designed for accounting firms to streamline the process of document exchange, collaboration, and tracking the status of client engagements
- **SafeSend Returns**: A tax return assembly, delivery, and e-signature solution designed for accounting firms, offering a client portal for secure document sharing and electronic signing of tax documents
- **ShareFile (by Cloud.com)**: A secure file sharing and collaboration platform with features tailored for accounting professionals, including client portals
- **Thomson Reuters NetClient CS**: A customizable client portal solution designed for accounting firms that integrates with other Thomson Reuters tax and accounting software, enabling secure document sharing, e-signatures, and online invoicing
- **CCH Axcess Client Collaboration (by Wolters Kluwer)**: A cloud-based, secure, unified collaboration hub for firms and their clients to manage all tax workflows
- **CCH Axcess Workflow (by Wolters Kluwer)**: A cloud-based workflow management solution designed for accounting firms, with features that include a client portal for secure document exchange, collaboration, task, and deadline management

Efficient Client & Team Experience

- What makes client interactions with your firm easy?
- What minimizes the effort for your team?
- How do you help your team get things done effectively year-round?
- Outside your busy season is a great time to focus on the relationship between “making things easy” and “getting things done”
- To get through busy season and not go crazy, you need the following things to be true…

What Do You Want The Experience To Be?

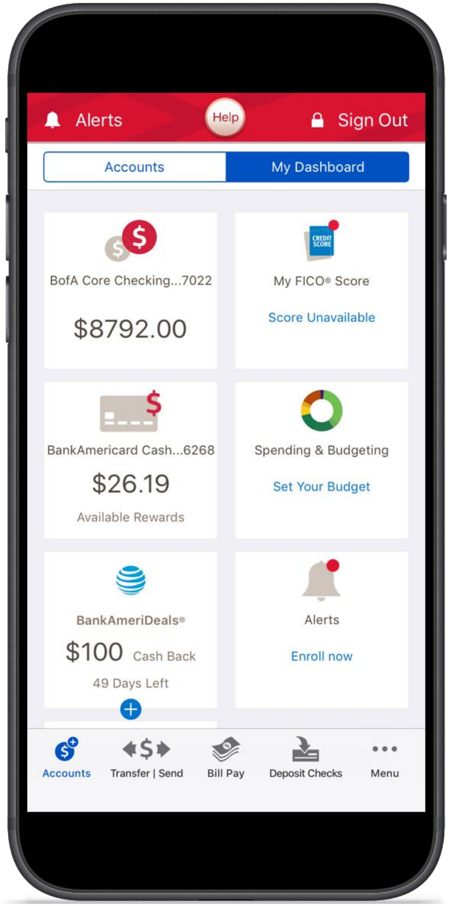
Client Experience

- Interact with your firm like Burger King – “Have it your way”
- Anytime, anywhere, anyway
  - Email
  - SMS text
  - Phone
  - Computer
- Respond to requests
  - Quickly
  - Completely
- Easy? = not frustrated

Team Member Experience

- Have all the need to do a project
- Collaboration
  - Clients
  - Others in the firm
- Where and When?
  - Work in the office on a schedule
  - Do occasional projects at home
  - Mostly remote work
  - Formal home office
  - Stop by the office occasionally
- Efficiently? = not frustrated

Is It Mobile?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Alerts
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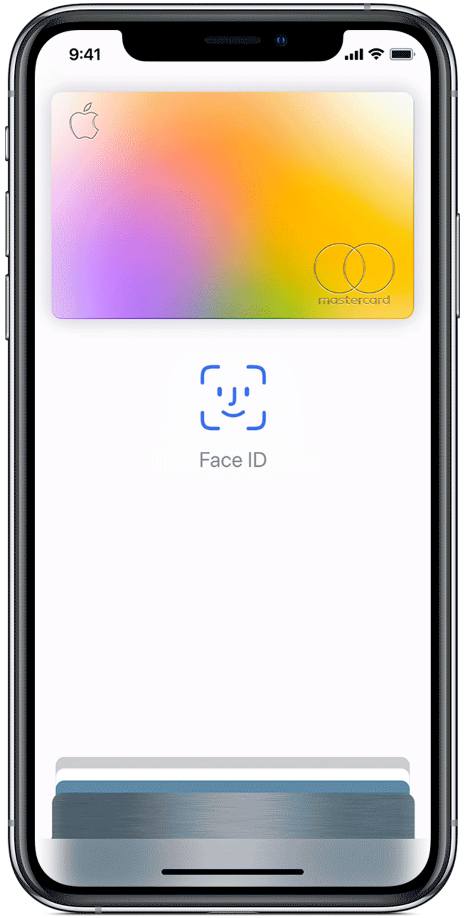
Accounts
Transfer | Send
Bill Pay
Deposit Checks
Menu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mastercard
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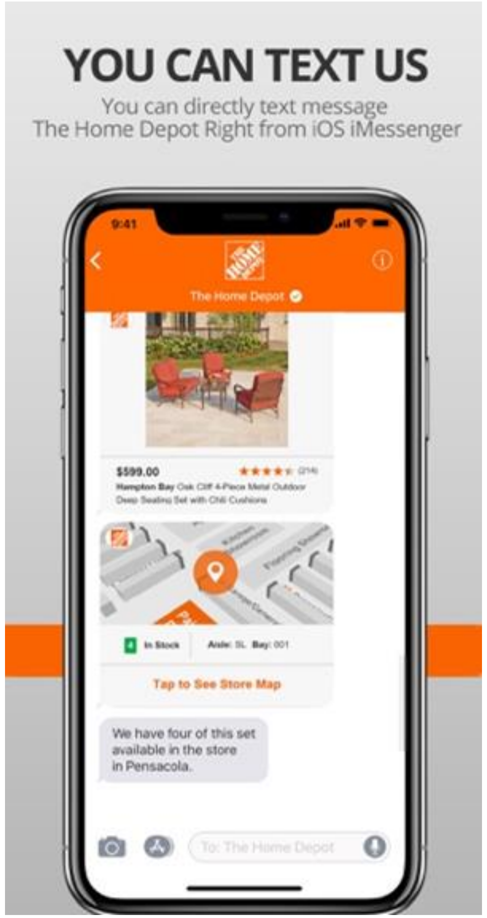
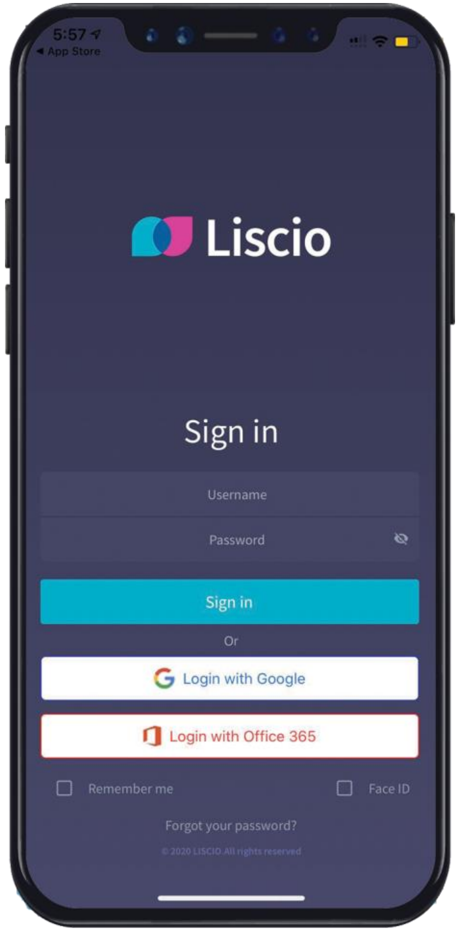

YOU CAN TEXT US
You can directly text message
The Home Depot Right from iOS iMessenger
The Home Depot
$599.00
Tap to See Store Map
We have four of this set available in the store in Pensacola.


10:40
eDoc
Type
Draw
Image
Sign
Sign Here
Enter your name
Close
Apply


Liscio
Sign in
Username
Password
Sign in
Or
Login with Google
Login with Office 365
Remember me
Face ID
Forgot your password?

Effective Client & Team Experience

- Outside your busy time is a great time to focus on the relationship between “making things easy” and “getting things done”
- To get through busy time and not go crazy, you need the following things to be true:
  - Clients sending you documents on time
  - Staff has complete visibility across clients
    - Who owes us what?
    - When did we request it?
    - Did they send that document?
- These things need to be true in busy times and throughout the year

What Are The Key Features Needed?

PORTALS

Top Portal Features

- **User authentication and authorization**: Secure login capabilities with multi-factor authentication (MFA) options and role-based access controls to ensure that users can only access the appropriate resources
- **Intuitive user interface (UI)**: An easy-to-use, responsive, and visually appealing interface that works across various devices, including desktops, laptops, and mobile devices
- **Customization and branding**: The ability to tailor the portal's appearance and layout to match your organization's branding, as well as the option to add or remove features based on your specific requirements
- **File sharing and storage**: Secure document sharing and storage, with version control, permission management, and the ability to organize files in a structured manner
- **Communication and collaboration tools**: Integrated chat, messaging, forums, or other communication channels that enable users to communicate with one another or the organization effectively
- **Real-time collaboration**: Tools that allow multiple users to work together on documents or projects simultaneously, such as document co-editing or shared whiteboards
- **Search and navigation**: An efficient search function and intuitive navigation that helps users quickly find the information or resources they need
- **Integration with third-party applications**: The ability to integrate the portal with other software tools and systems, such as CRM, project management, or accounting software, to streamline workflows and data sharing
- **Analytics and reporting**: Tools that provide insights into user behavior, portal usage, and other relevant metrics to help organizations make informed decisions and optimize the portal experience
- **Security and compliance**: Robust security features, such as encryption, secure data storage, and compliance with industry-specific regulations (e.g., GDPR, HIPAA), to protect sensitive information and maintain user trust

Top Portal Features Desired By CPAs

- Single Portal
- Client reminders (Auto Nag)
- eSignature with KBA (Knowledge Based Authentication)
- Payments
- Integration to Practice Management, Document Management, Workflow, Tax, and Audit software

Client Portal	PBC Integration	Receipt Notification	Accept/Reject Docs	Tickler or timers for stale	Chat Integration	Client Retrieval of Historical Info	Ease of Use Client	Ease of Use Firm	Extract to Internal system (CaseWare, Engagement, Tax)	Mobile Use	Email Integration	Template other clients	Minimum Managemen	Self-Serve Passwords	Client Role restriction	Role Depth	Smartsheet integratio	Rollover/Lockout	Price	eSignature (KBA)	Payment Integration	Engagement Letters

Let’s Frame The Discussion Understanding Collaboration First
Comparing And Contrasting Where It Makes Sense

NOTE THAT COLLABORATION IS A TOP PORTAL FEATURE

What's It Take To Collaborate?

Software

- Web Meetings
- Productivity
- Collaboration
- Portals
- Project Management
- LOB/CRM/DMS/Workflow

Hardware

- Connectivity
- Computer/Smartphone/VOIP
- Sound
- Camera
- Lights/Background
- Scanner/Monitor

Technology Has Made It Easier

Convenience

- Internet access has become more ubiquitous and faster
- Reliability is improving
- Speed is improving
- Mobile functionality is better
- Centralized Administration

Tools

- Collaborative suites like Microsoft 365, Google Workplace, and Zoho One have become more powerful AND browser enabled
- Apps have become silos of information, and digital plumbing tools are connecting many of these effectively

Operational Concerns

Management

- Relationships
- Coordination
- Wellbeing
- Strategic improvements
- Motivation

Administration

- Security
- Accounting/Billing
- Maintenance
- Onboarding
- Retention

COLLABORATION WITH CLIENTS VIA YOUR FIRM PORTAL

Think End To End – Portal/PBC

Core – Must Have	Secondary – Better to Have

Core – Must Have

- Security
- Ease of use
- Client experience
- eSignature including KBA

Secondary – Better to Have

- Gather all engagement documents automatically
- Integration to PM/DMS/Tax
- Suite OR
  - Liscio
  - Suralink
  - TaxCaddy

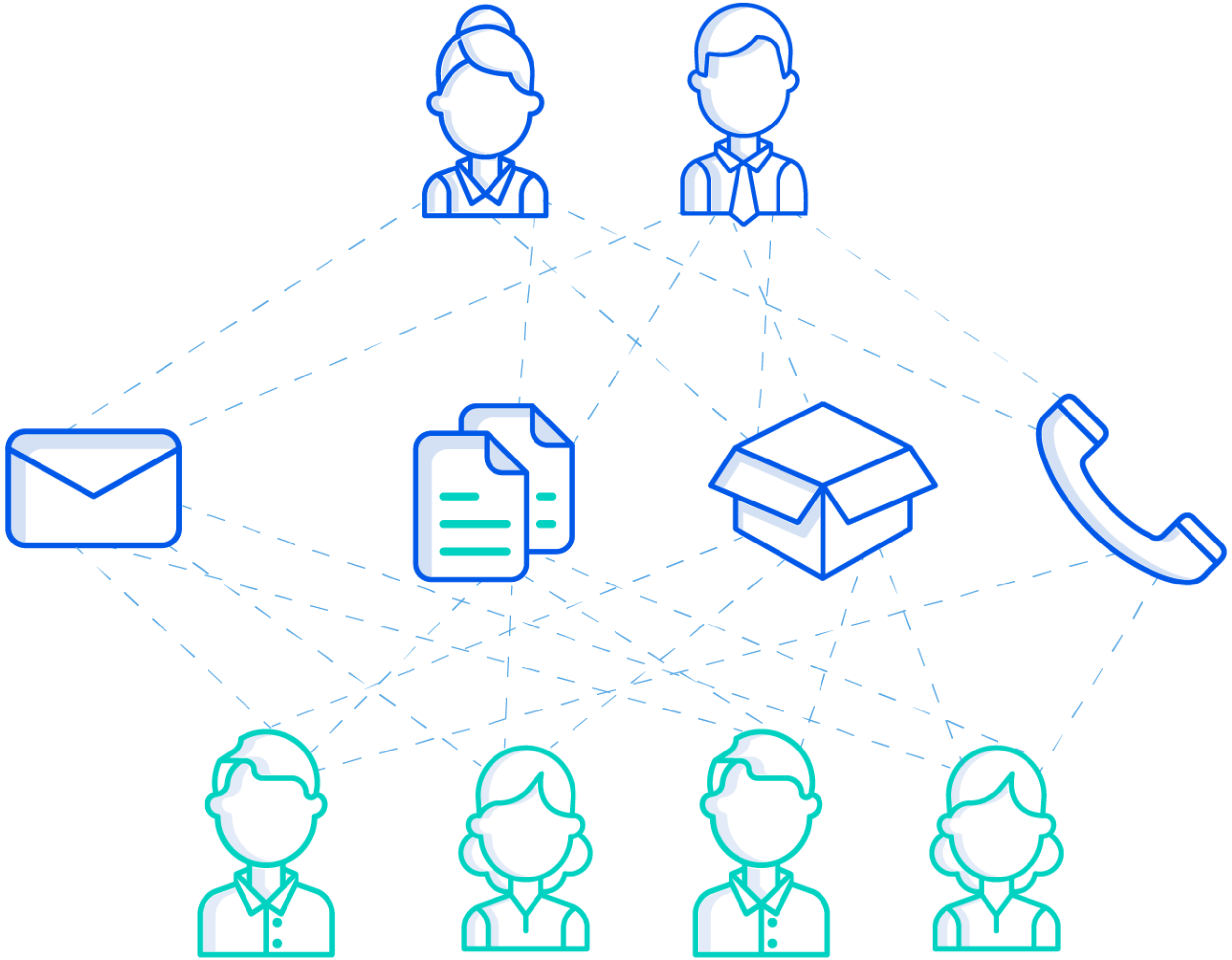
Rethinking CPA To Client Data Flows

- Significant products should be reviewed for your tax workflow
  - Liscio
  - Suralink
  - SmartVault
  - HubSync
  - ShareFile PBC list tools
  - cPaperless SafeSend Returns
  - SurePrep TaxCaddy
- CCH My1040Data for Axcess
- CCH Axcess Client Collaboration
- Pascal Workflow "Payment Protection"
- Karbon Practice Management/CRM/Workflow
- Canopy Tax
- StanfordTax
- Truss
- Digilence

[Skip To Payments]
[Skip Collaboration Tools]

The Common Tax Process

Overwhelming
Communications
And Document
Exchange Issues



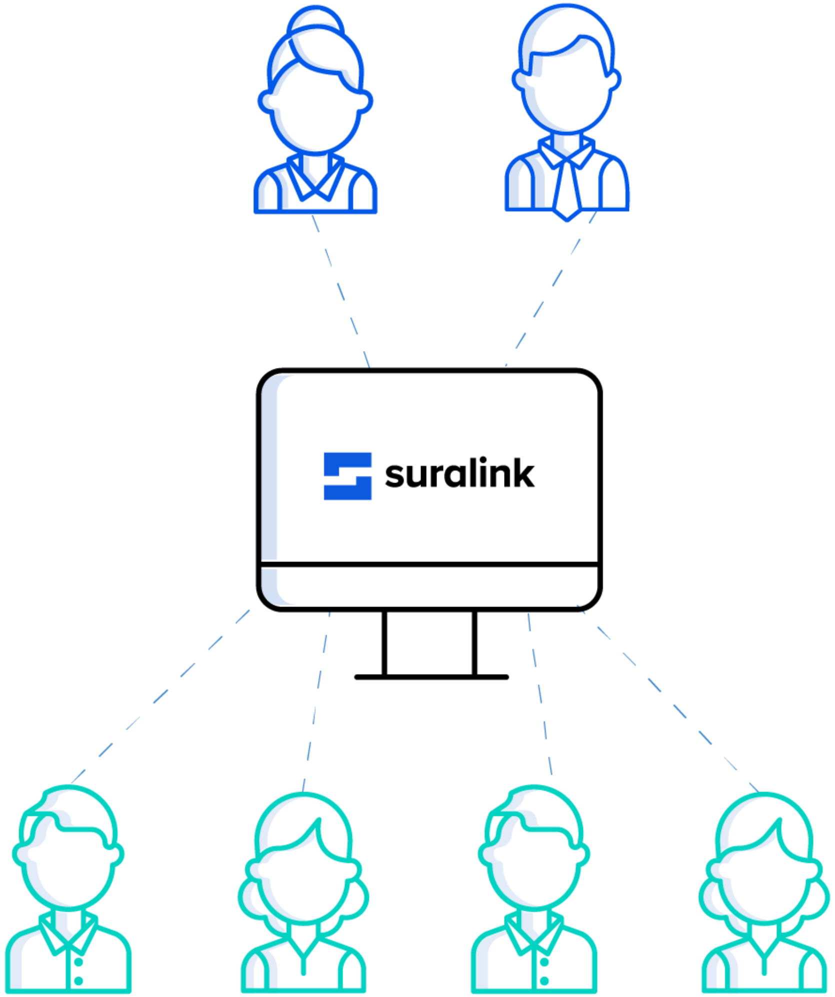
Problems And Frustrations

	For Clients	For Firms
Inefficiency	• Email documents individually or in small batches • No way to track provided documents • Can't easily delegate or track requests	• Spreadsheets have to be manually updated • Team & client status updates take forever • Too much time spent organizing & chasing documents
Lack Of Visibility	• Unsure if they provided the right document • No visibility into overall engagement progress • No visibility into individual request timelines	• Request lists are constantly out of date • Partners, managers, & CFOs have limited visibility into the process • Unclear timeliness
Miscommunication	• Provide the same document multiple times • No easy way to communicate about individual requests • No way to organize documents	• Clients say everything is in the portal • Clients say they gave it to someone else • Firm makes duplicate document requests

The New Way

Request and Receive
Files with

suralink



Solutions And Benefits

Improved Efficiency

- Increased efficiency and realization
- Streamlined experience for clients
- Each request has a due date and audit trail

Increased Visibility

- Firm members and clients are looking at the same list, in real time
- Partners & managers have full visibility into the process

Improved Communication

- No confusion on what documents have been requested, provided, or are still outstanding
- Ability to communicate on per request basis

Security And Compliance

Security

Multi-factor authentication

Inactivity time-out

Encrypted third-party access

Access restriction by role or engagement

SSL AES 256-bit encryption

SSAE16 Type II SOC1, SOC2 compliant data centers

Recovery, backup, audit logs

Compliance

SOC2

GDPR

CCPA

ISO 27001

ISO 9001

ISO 14001

OHSAS 18001

Premium Plan Pricing

Bulk-user discounts available

Standard

$29 /mo
Per Firm User

All Suralink features & functionality

Request a Quote

- Unlimited storage and file size
- Unlimited engagement and requests
- Unlimited client users
- Firm training and live support
- No setup fees
- Custom branding

API & SSO
Advanced automation
IP restriction
Domain restriction
Export client page

Premium

$39 /mo
Per Firm User

All Suralink features & functionality

Request a Quote

- Unlimited storage and file size
- Unlimited engagement and requests
- Unlimited client users
- Firm training and live support
- No setup fees
- Custom branding
- API & SSO
- Advanced automation
- IP restriction
- Domain restriction
- Export client page

Secure File Sharing Plan

$17 /mo
Per Firm User

Bundle options available with Request List Management

Request a Quote

- Send files of any size via email or by generating a secure link
- Request files by sharing a custom link
- Clients can upload documents without creating an account

Client Experience

What Has It Been?	What Should It Be?

- Disconnected
- Multiple channels
  - Email
  - Text
  - Portal
- Scan and email files

- Collaborative
- Single method to handle
  - Email
  - Text
  - Client Interactions
- Attach files in mobile app or browser

Client Collaboration Is Chaotic

Email

Paper Mail

E-Sign

The State of Client Collaboration

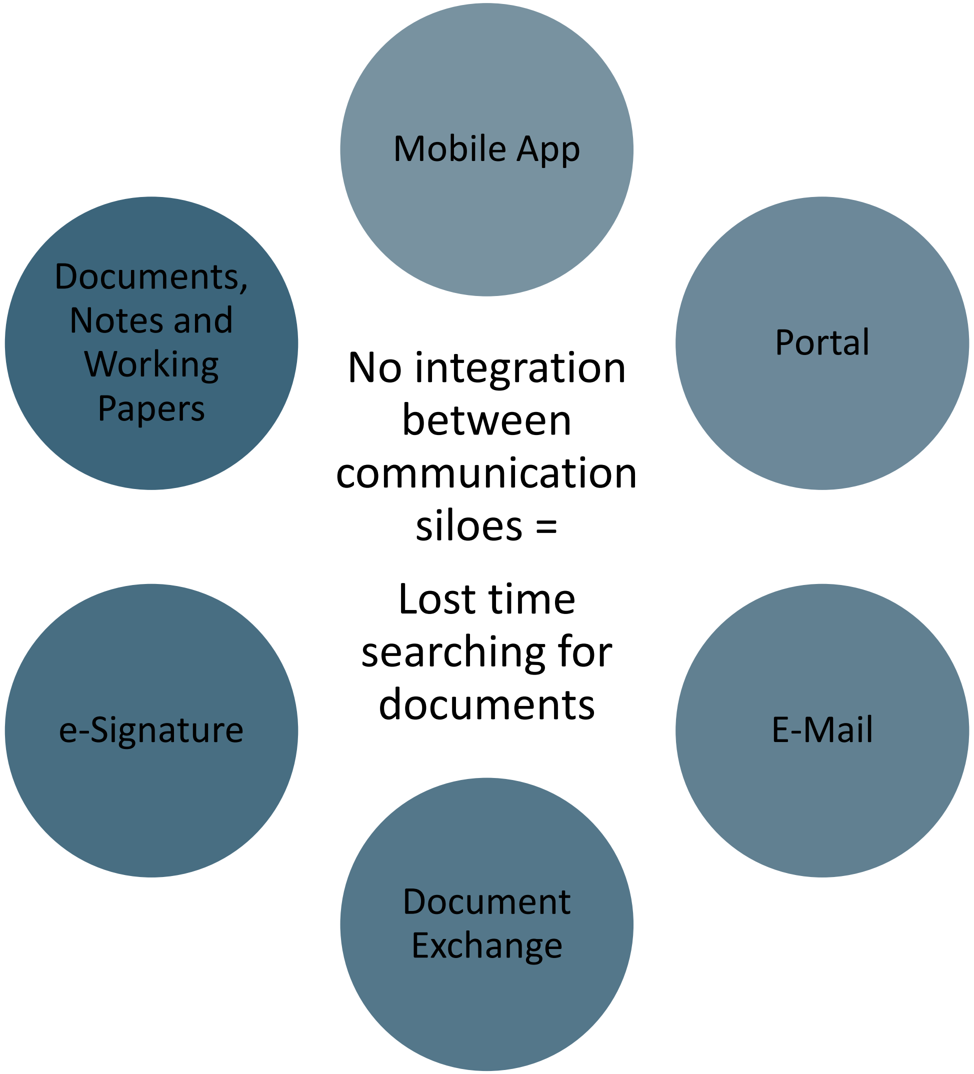
Portals

In Person

Secure File Transfer

The Communication Octopus

Multiple Siloed Client-Facing Communication Channels



Client Experience

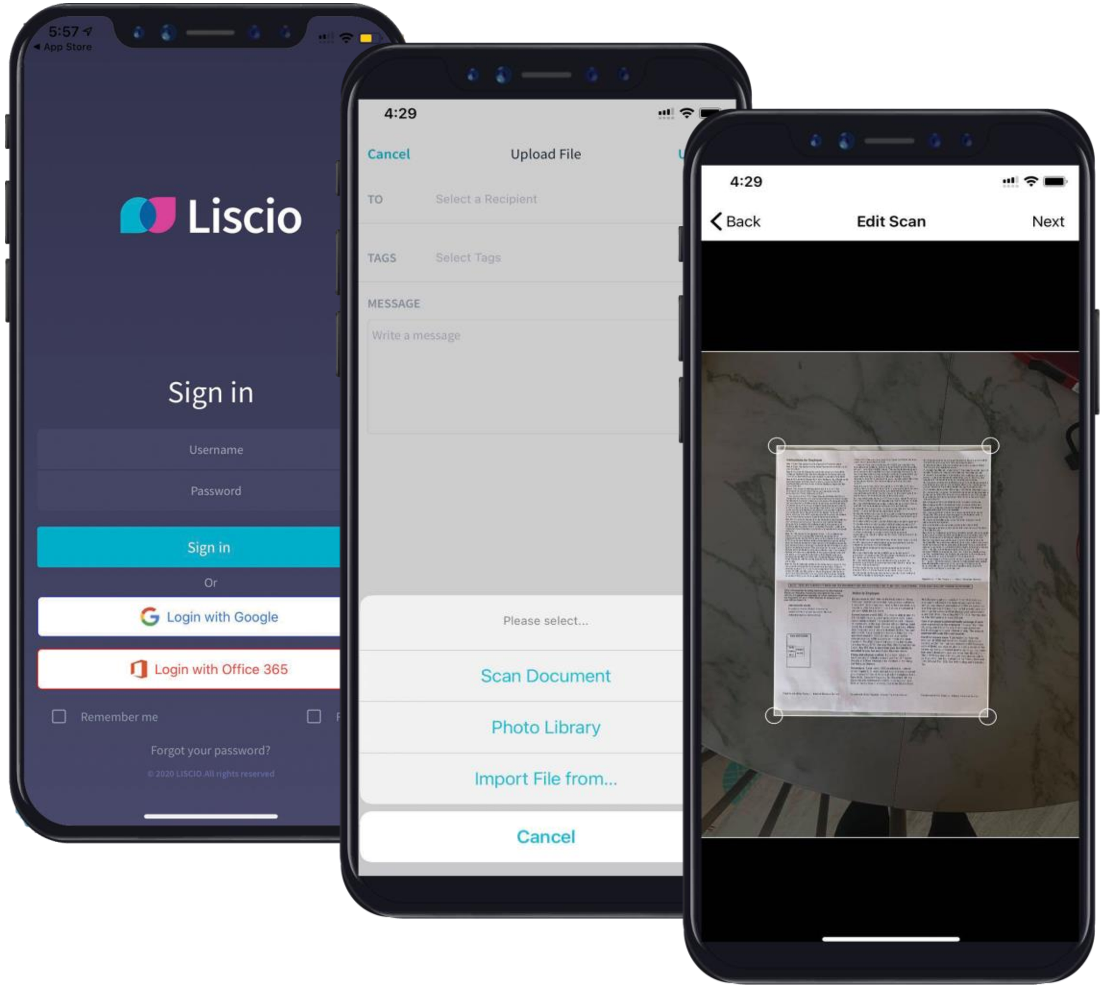
Old Way	New Way
• Scan and email files	• Take picture and convert to PDF
• Documents scattered	• Documents gathered
• Structured by folder	• Structured by client
• Located by search	• Located by classification or name
• Names somewhat random	• Tags used to classify documents
• Disjoint	• Integrated
• Difficult	• Easy

Tame The Communications Octopus

While Breaking Down Barriers For Each Silo With **Liscio**

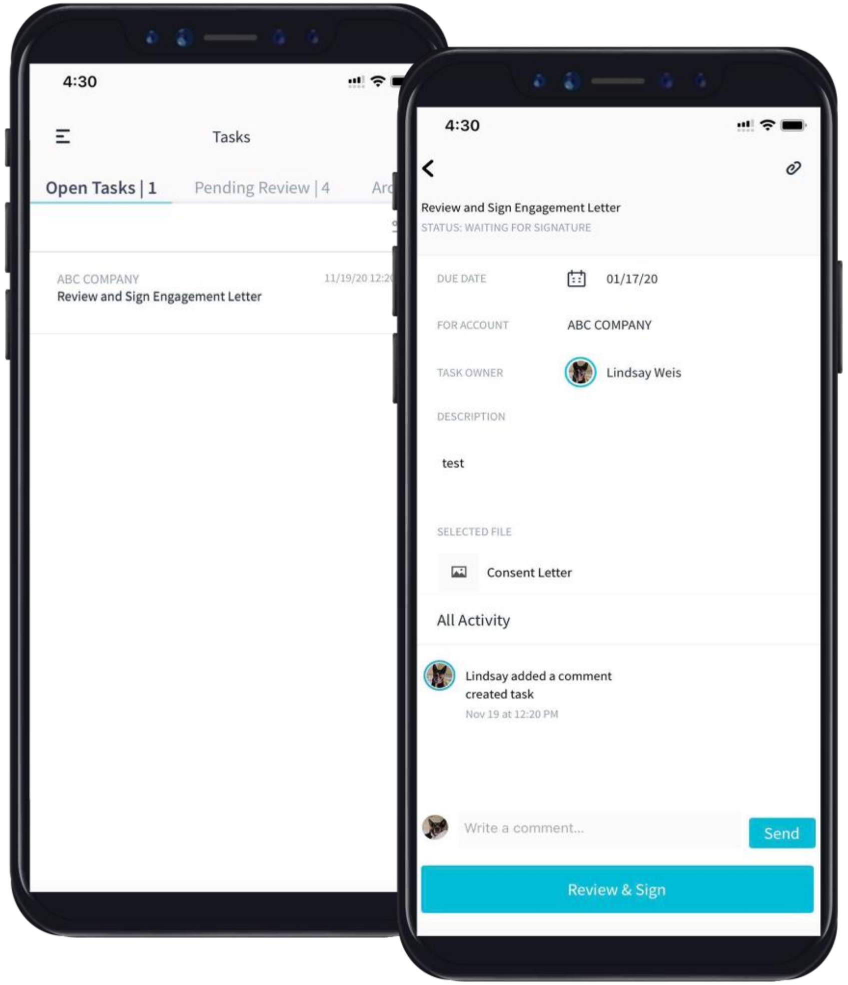
Liscio Scanning Capability

- Converts pictures from cell phones to PDF
- One Step for clients
- Ready to use PDF for team members



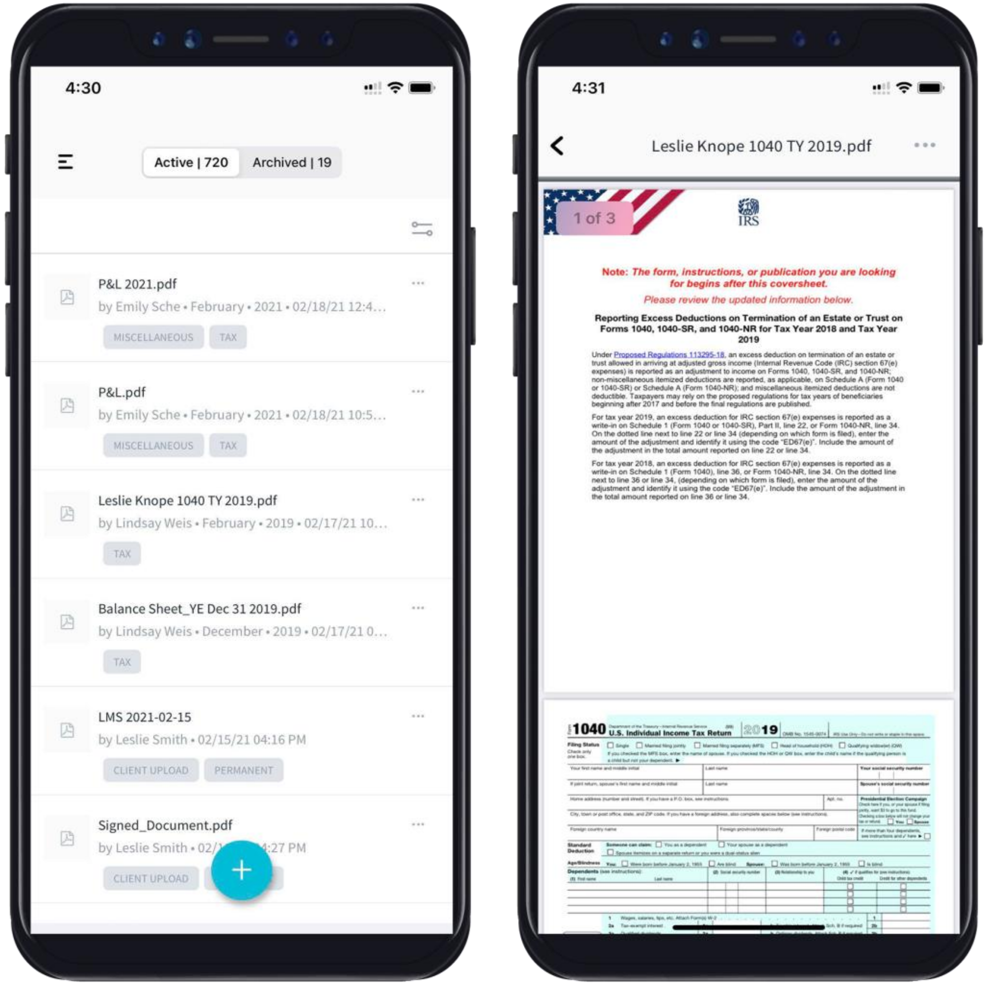
Liscio To Do List

- Shows open items to client
- Visibility by all team members
- Notifications to client and team



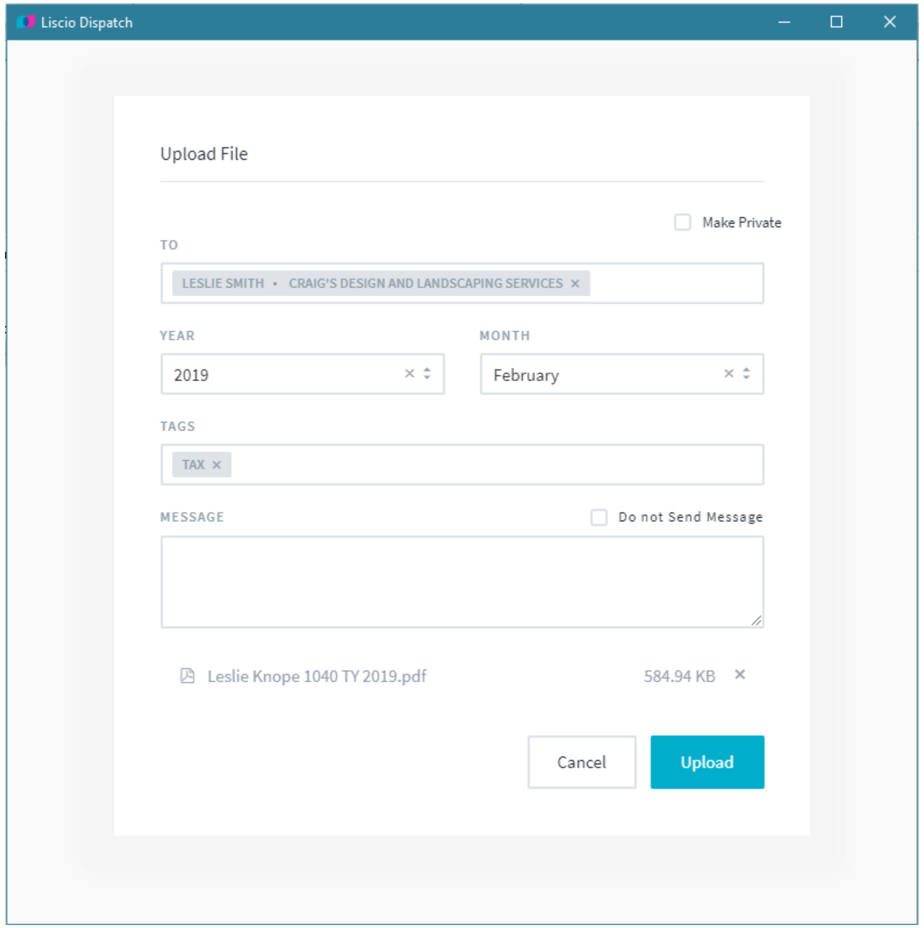
Liscio Files

- Completed engagements
- No charge for storage
- No charge by client



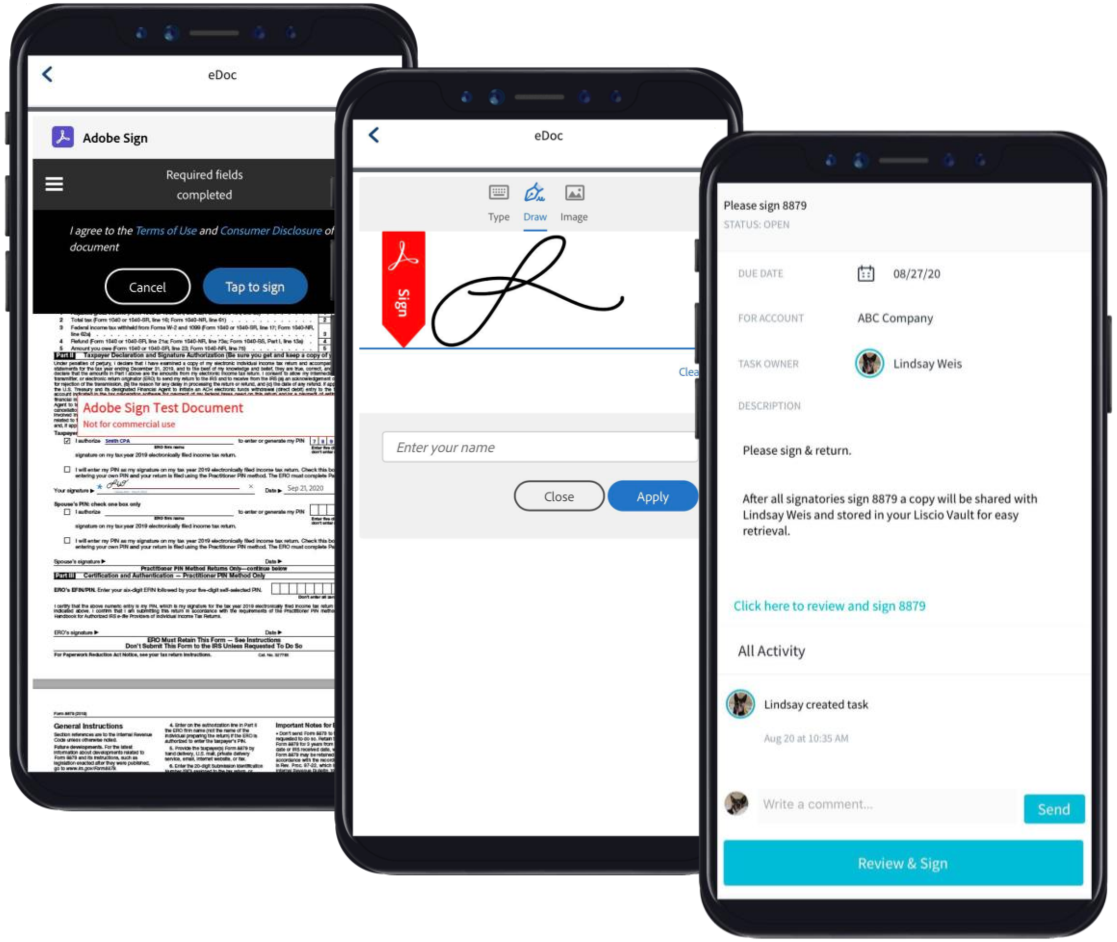
Liscio Dispatch

- Integrated
- If you can print, you can use Dispatch

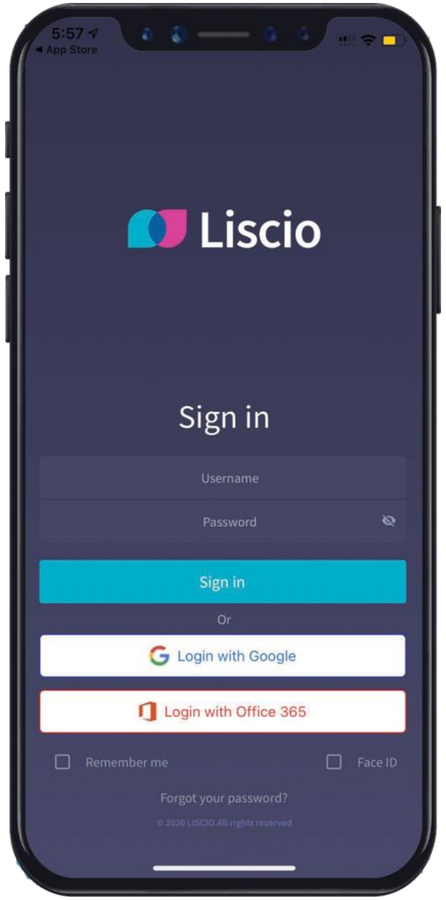


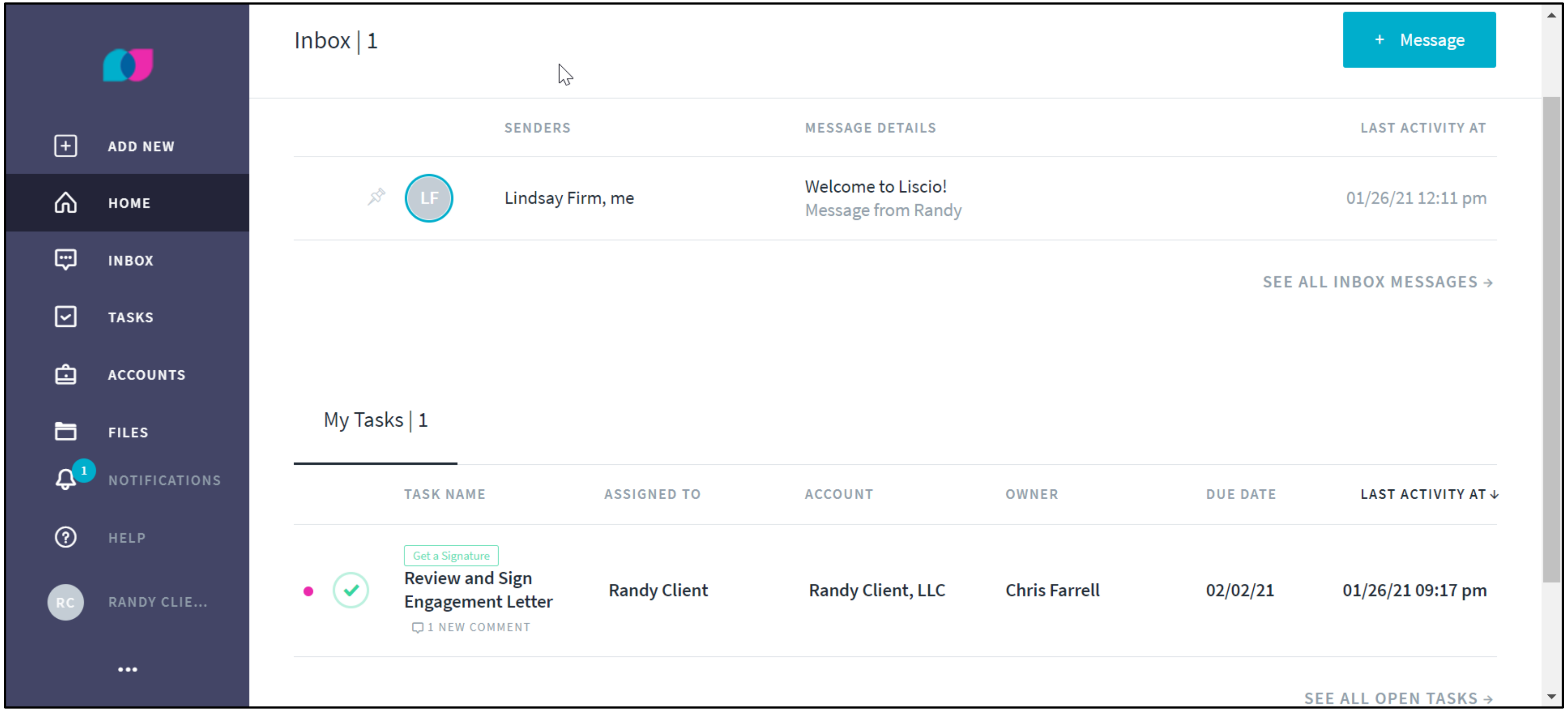
Liscio eSignature

- Works on any device
- Knowledge-based authentication



Liscio Client Experience 2.0





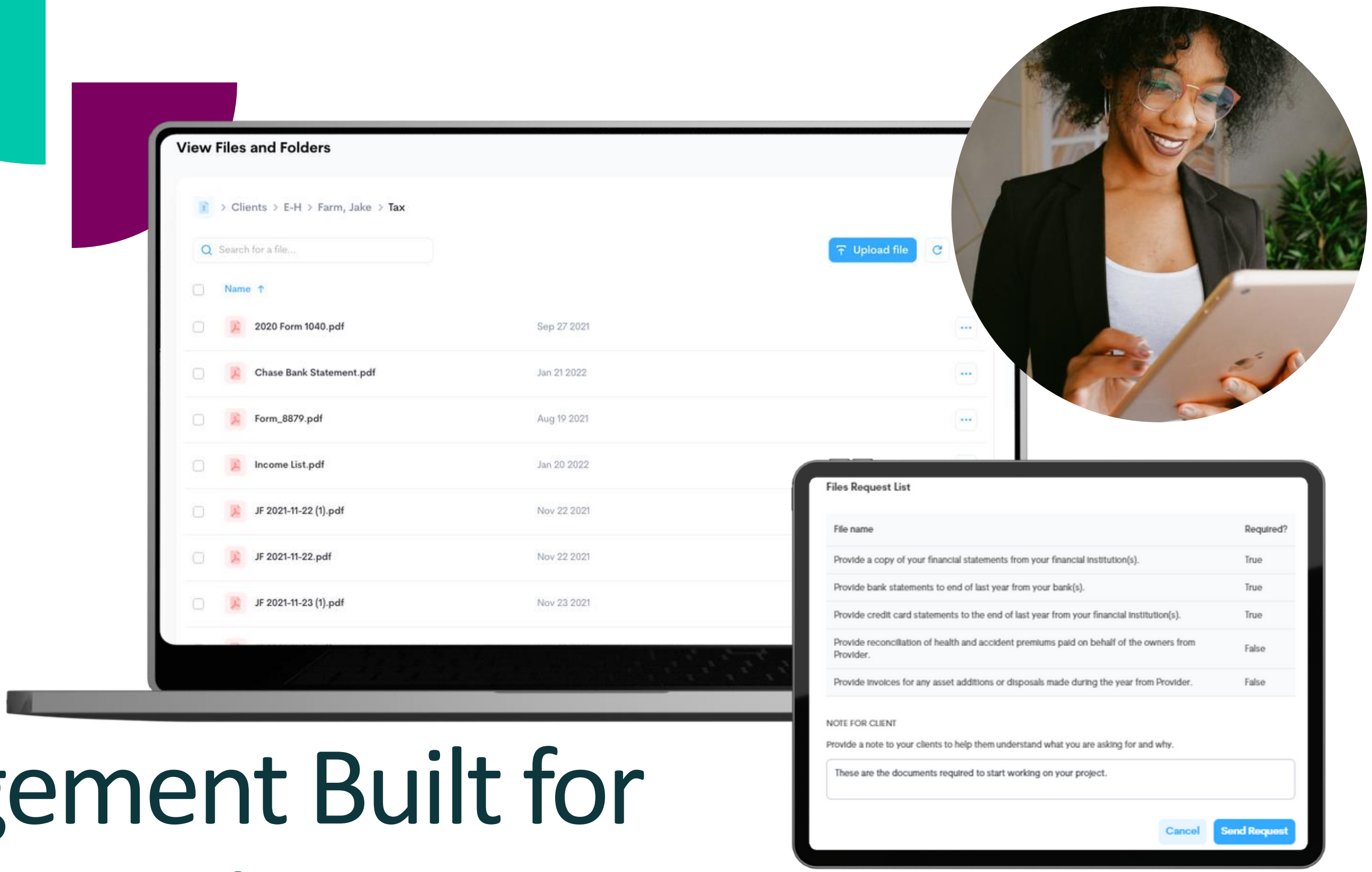
What's New With Liscio?

- Requests
  - Build any workflow from a single authoring tool (e.g. onboarding, questionnaires, close checklists, tax checklists, etc.)
  - Includes a progress bar which shows how much client has entered to date in real time
- Business Texting – two-way texting in a single platform
- Email integration – works with Gmail and Outlook
- Timeline
  - Single screen dashboard for each account
  - Shows all texts, emails, secure messages, file uploads, signatures, and requests with the progress bar by contact and account
- Mobile apps and mobile web

Direct Cost Comparison

Paper Organizers		Liscio Organizers	
Paper	$ 0.50	Tailored questions	✅
Toner	$ 1.00	Easy to use	✅
Envelopes	$ 0.20	Mobile App	✅
Mailing	$ 3.00	Mobile Web	✅
Return postage	$ 3.00	Mobile scanner	✅
Direct cost	$ 7.70	See progress in real time	✅
Labor	$2.00-$4.00	Collaborate with client	✅
		Highest response rate	✅
Total:	**$9.70 - $11.70**		**$ 4.00**

SmartVault



Introducing SmartVault

Document Management Built for Accounting Professionals

The SmartVault Difference

Relentless accounting focus

We understand your unique workflows, pain points, and what it takes to deliver exceptional service.

We provide an intuitive platform tailored to your real-world needs and proven to increase productivity.

drives our product

15+
years

3M+
users

400M+
docs stored

"SmartVault started in accounting, so they deeply understand the workflows and regulatory compliance requirements." - Brian Tankersley, CPA

SmartVault

Built to alleviate your challenges.

SmartVault helps us provide personalized services to our clients, increase collaboration, and create stability and security in our workflows.

Diane Curtis, Affiliated Financial Services

Top Challenges Accounting Pros Face:

Inefficient Processes and Low Productivity

Risk of Non-Compliance and Security Breaches

Limited Growth and Inability to Retain Staff

SmartVault

Built to alleviate your challenges.

Top Challenges Accounting Pros ~~Face:~~ solved

Create Efficient Processes & Increase Productivity

Protect Data and Simplify Compliance

Scale Your Firm and Retain Top Talent

SmartVault helps us provide personalized services to our clients, increase collaboration, and create stability and security in our workflows.

Diane Curtis, Affiliated Financial Services

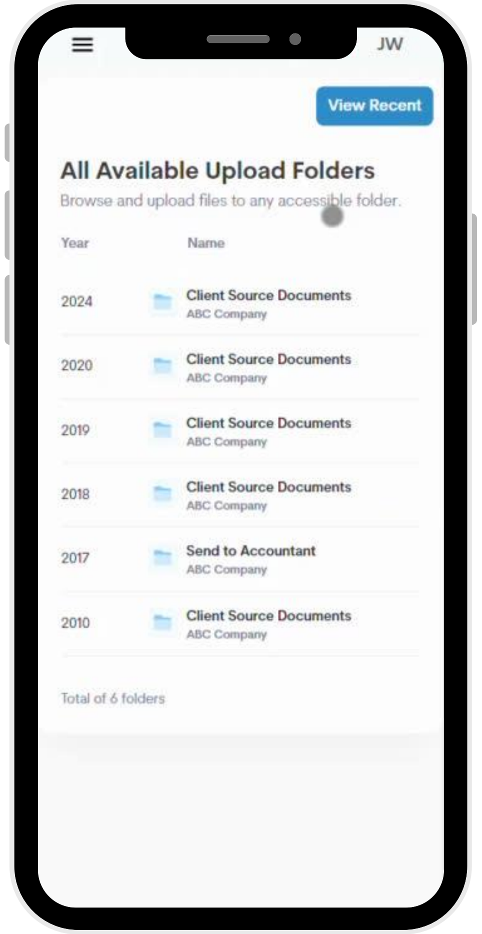
SmartVault

Create Efficient Processes & Increase Productivity

- Automated document collection and routing
- Centralized document repository
- Secure client portal for seamless file sharing
- Version control and collaboration tools
- Integration with tax software

"My clients upload documents directly into designated folders. This has saved me countless hours of admin work and given my clients an easy, secure way to submit their paperwork."

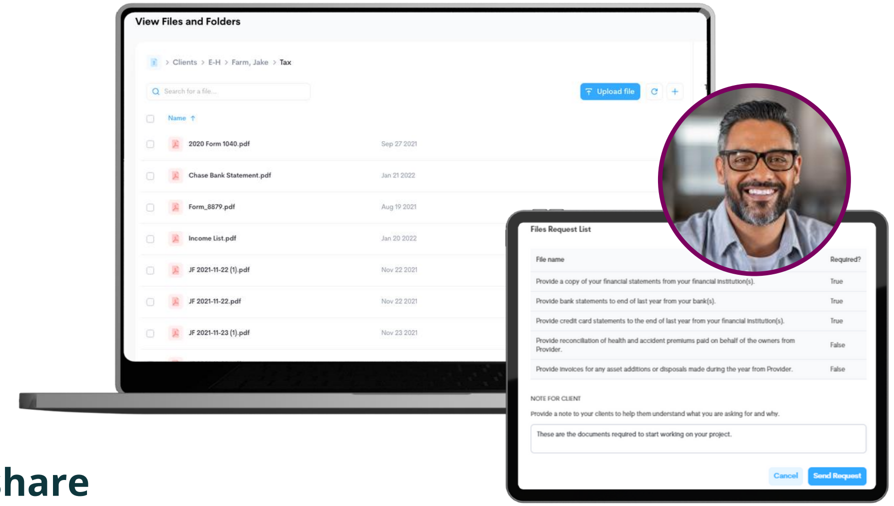
Amanda Leddington,
A.H. Financial Management Services



SmartVault

Protect Data and Simplify Compliance

- Stringent compliance support with GLBA, FINRA, SEC, etc.
- Bank-grade encryption
- Granular access controls and user permissions
- Detailed audit trails for all document activity
- Automated data backup and recovery



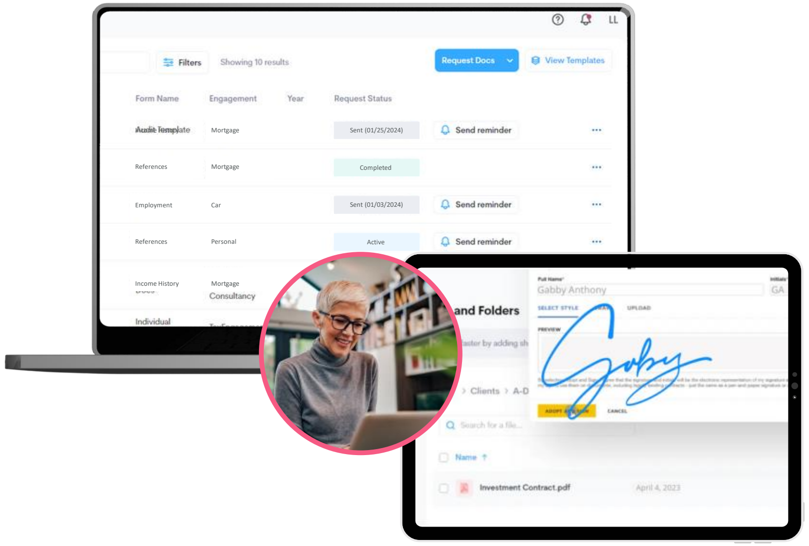
“SmartVault has transformed the way we manage and share sensitive client data. Before SmartVault, we relied solely on email and physical mail, which was costly, inefficient, and less secure.”

Prudence Petrykowski,
PK Petrykowski CPA

SmartVault

Scale Your Firm and Retain Top Talent

- Efficient client onboarding with engagement creator
- eSignature capabilities for seamless agreement signing
- Enables staff mobility and remote work
- Maximizes productivity to service more clients
- Eliminates tedious admin work for staff
- Scale with **unlimited storage** and guest users



“We were doing about 700 tax returns. Now we're more than double that at about 1,800. We would have never been able to do that without improving our communication with our clients on a mass scale.”

Nick Boscia,
Boscia & Boscia P.C.

SmartVault

Integrated with the Apps You Love

Enhance your productivity and service quality with seamless integrations.

THOMSON REUTERS

Liscio

FreshBooks

DocuSign

intuit proconnect

intuit Lacerte

intuit quickbooks

FinancialCents

DrakeSoftware

taxcalc

Wolters Kluwer

rightworks

SmartVault

So Many Options

WHAT ABOUT PAYMENTS?

Payment Automation Advantages

- **Time savings**: Automation reduces the time spent on manual payment processing tasks, such as creating invoices, tracking payments, and reconciling accounts, allowing businesses to focus on more strategic activities
- **Improved cash flow management**: Automated payment systems enable better forecasting and management of cash flow by streamlining payment processes and providing real-time insights into receivables and payables
- **Reduced errors**: Automation minimizes the risk of human error in payment processing, such as data entry mistakes, miscalculations, or missed payments, leading to more accurate financial records
- **Enhanced security**: Reputable automated payment systems employ advanced security measures, such as encryption, tokenization, and fraud detection tools, to protect sensitive payment data and minimize the risk of unauthorized transactions

Payment Automation Advantages

- **Cost savings**: By streamlining payment processes and reducing manual tasks, businesses can save on labor costs, postage, and other expenses associated with traditional payment methods
- **Improved customer experience**: Automated payment systems offer customers greater convenience, allowing them to make payments online, set up recurring payments, and access payment records more easily. This can lead to increased customer satisfaction and loyalty
- **Better compliance**: Automated payment systems can help businesses adhere to industry regulations and standards, such as PCI DSS (Payment Card Industry Data Security Standard), by ensuring that payment data is stored and transmitted securely
- **Faster payment processing**: Automation can speed up the payment process, reducing the time it takes for funds to be transferred between accounts and enabling businesses to access their funds more quickly

Payment Automation Advantages

- **Enhanced reporting and analytics**: Automated payment systems often include reporting and analytics tools that provide valuable insights into payment trends, customer behavior, and overall financial performance
- **Scalability**: Automated payment systems can easily scale to accommodate business growth, whether it's an increase in the number of customers, transactions, or expansion into new markets
- **Buy Now, Pay Later (BNPL) options**: An option to receive goods and services and defer payment to a later time
- **Interest free payment options**: A sales promotion approach to allow payment later with no interest for a period
- FedNow (same day ACH) could disrupt payment options as it rolls out in 2023 and beyond with products like Forwardly

Top Payment Services

- **PayPal**: A widely used digital wallet & payment processing solution for online and in-person transactions, offering services for individuals, businesses, and e-commerce
- **Stripe**: A popular payment processing platform for businesses of all sizes, providing online and in-person payment solutions, as well as subscription billing, fraud prevention, and international payment support
- **Square**: A comprehensive payment processing solution, offering a range of tools for businesses, including point-of-sale (POS) hardware, invoicing, virtual terminals, and e-commerce integration
- **Authorize.Net**: A well-established payment gateway and processing service, offering solutions for online, mobile, and in-person transactions, as well as fraud prevention and recurring billing capabilities
- **Braintree (a PayPal service)**: A payment processing platform designed for online and mobile businesses, providing global payment support, fraud protection, and integration with popular e-commerce platforms
- **Adyen**: A global payment processing platform that serves businesses of all sizes, offering online, in-app, and in-store payment solutions, as well as risk management and data analytics tools
- **Worldpay (from FIS)**: A leading payment processing provider that offers solutions for businesses across various industries, including online and in-person payments, fraud prevention, and subscription billing
- **Chase Merchant Services (formerly Chase Paymentech)**: The payment processing arm of JPMorgan Chase, offering a wide range of solutions for businesses, including online and in-person payment processing, mobile wallets, and fraud protection
- **First Data (now Fiserv)**: A global payment processing company that provides a variety of solutions for businesses, including point-of-sale systems, online payment gateways, and integrated payment solutions
- **Global Payments**: A worldwide payment processing provider that offers services for businesses of all sizes, including online and in-person payment processing, fraud prevention, and analytics tools

Top CPA Firm Payment Options

- CPACharge
- Corpay One (mostly free ACH, QBO, AP/Expense Automation)
- QuickFee (which has the pay later feature)
- GoCardless (ACH for recurring billing)
- Kotapay
- Veem (good international, QBO)
- VeriCheck
- PaySimple (QBO integration)
- BizPayO (interfaces to QBO/QBD)
- Heartland Payment Systems
- Global Payments
- Melio
- Tipalti (strong at international SWIFT as well as ACH, many integrations)
- TelPay (Canada)

What Do You Want The Experience To Be?

Client Experience

- Retain credit card info to make future transactions easier?
- Seamless
- Single click payment
- Payment option on invoices
- Easy? = not frustrated

Team Member Experience

- Payments flow into and out of appropriate systems
- Card info kept at merchant
- Ability to originate charges
- Integrate in billing
- Efficient? = not frustrated

What Controls And Admin Are Needed?

Client Experience

- Notification
- Approval
- Credit limit management

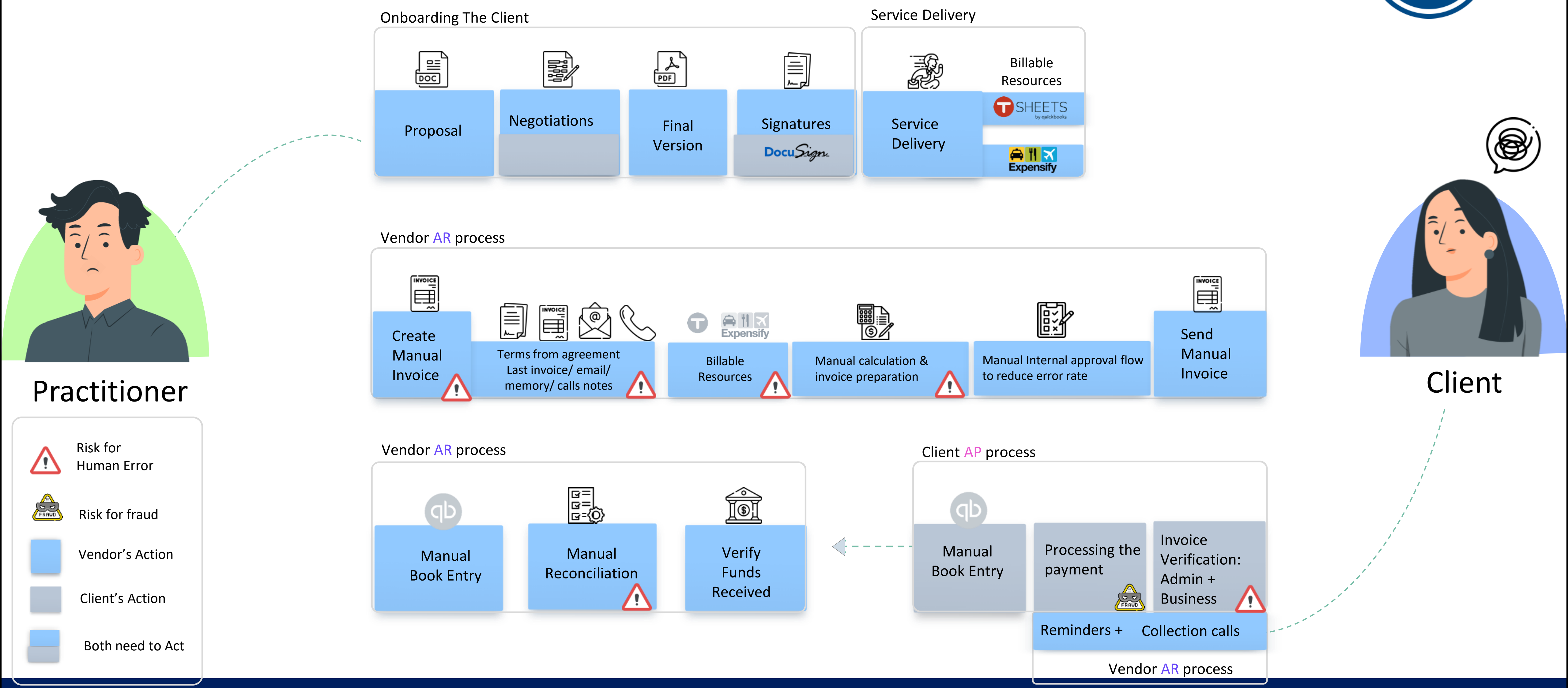
Team Member Experience

- Ability to choose timing
- Automatic reconciliation
- Update expired cards easily

anchor

anchor

Billing and collections is a (manual) mess



However, existing ‘automated’ solutions are siloed across the value chain

Proposals and Agreements	E-Signatures	Integrating Resources	Manual simple invoice	Dynamic invoicing	Dunning reminders	Client manual payments	Dynamic auto payments	Reconciliation	Agreement amendment
PDF, W, X, PandaDoc	PDF, DocuSign, PandaDoc	Expensify, TSheets by quickbooks	intuit quickbooks, Bill.com, Invoiced		Invoiced, Bill.com	intuit quickbooks, Bill.com, melio, Invoiced		intuit quickbooks	PDF, W, X, PandaDoc

Causing the intrinsic cost (%) of every invoice to grow

$500 invoice

~$32 manual labor (not billable)

Revenue leakage – $23 (4.6%)

CC processing fee - $14.5 (2.9%)
Or Cash, wire, check, QB - $15

Merchant fee - $2

Tools[1] - $5

Other[2] - $25

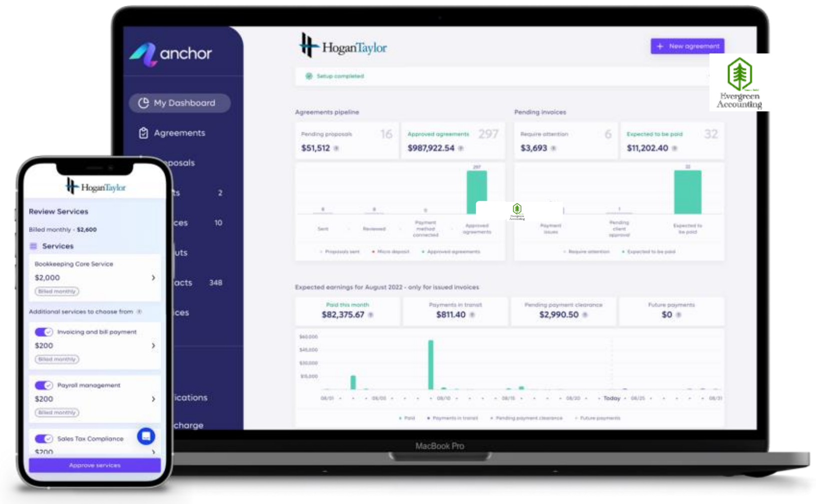
Profit - $398

Revenue loss – 20.4%

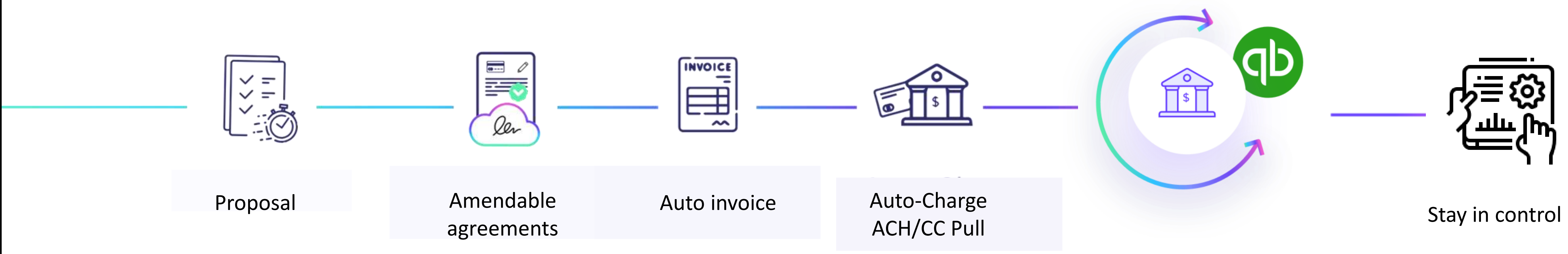
Calculation is based on a volume of 100 invoices per month
[1] Software tools e.g., signature, GL
[2] Late payments, penalties, fraud ~$25 per invoice

anchor

From proposal to paid, all in one.
Streamlined, Connected, Automated.



Anchor automates the entire process of getting paid by clients, end-to-end.
Send your Anchor proposals, and the platform will auto-invoice, auto-charge, and auto-sync with your accounting software while having full flexibility to amend signed agreement with the click of button.



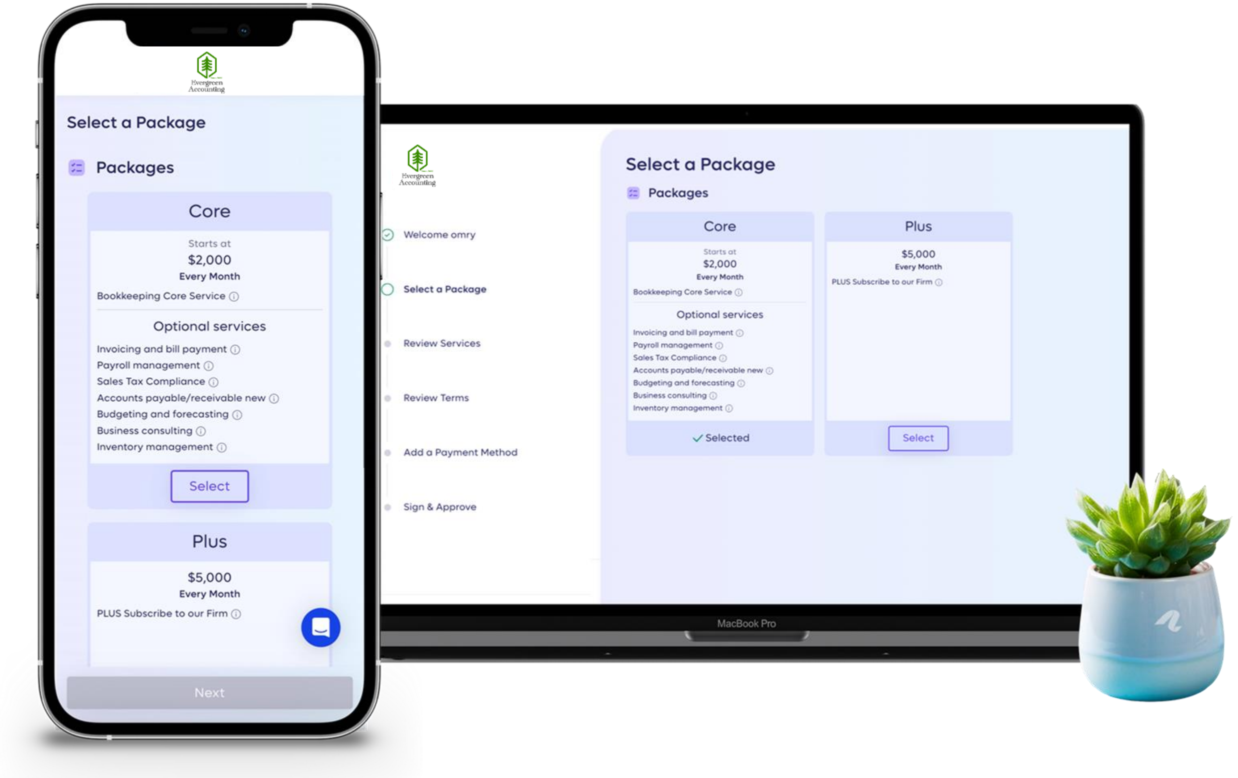
No subscriptions,
No credit card fees

Proposal

Easily build and send Proposals

Simple, flexible and comprehensive proposal tool - choose services from your service library, add your terms, and send it to your client to digitally e-sign from every device.

- Pre populated service and proposal templates
- Multiple packages pricing
- Add optional services for your clients to choose from
- Automaded notifications & reminders to sign
- Tracking tool to see signing progress.
- Credit card fees paid by the client as default (or by you)



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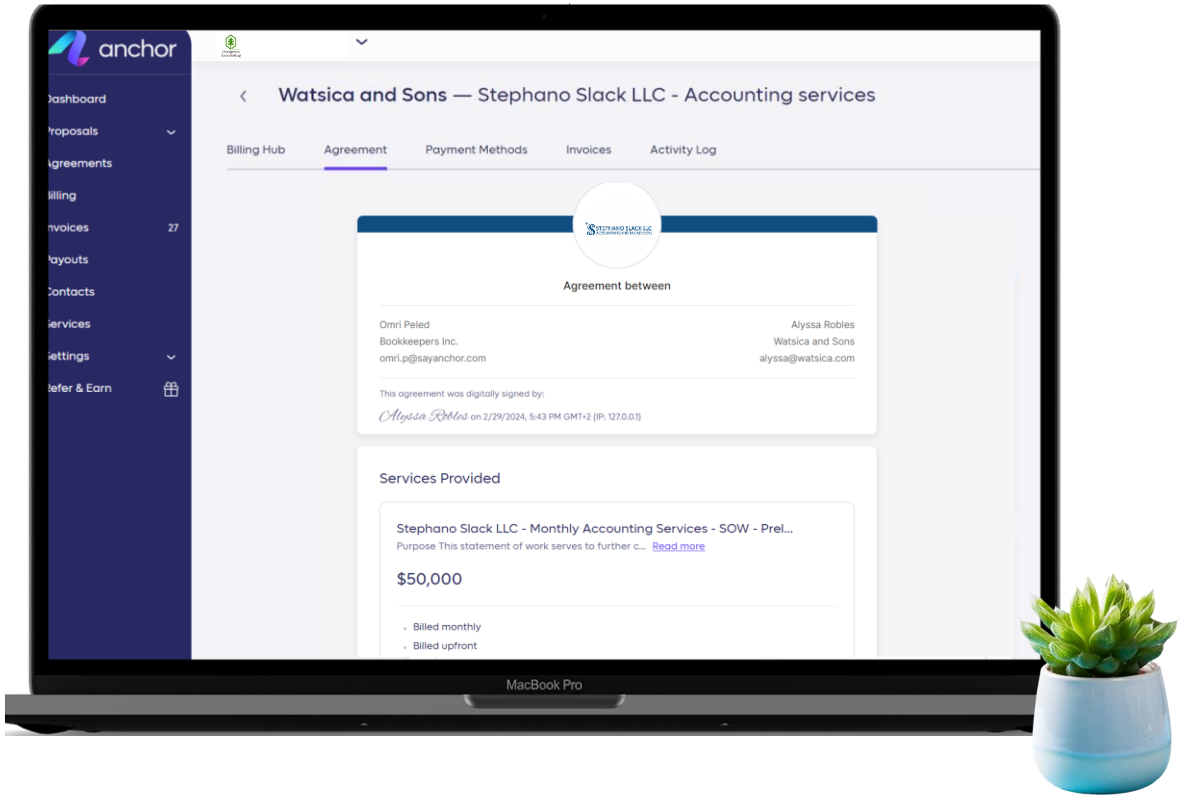
Agreements

Managing dynamic agreements Like your clients' needs.

Streamline your billing with amandable agreements to adopt to changing services, service scope, pricing and terms, with full flexibility control & visibility.

- Amend existing agreements in one click with auto-approve option
- A centralized place to Add charges or apply a credit
- Controlling and changing client payment methods
- An activity log to track and record account movement
- A dedicated client portal

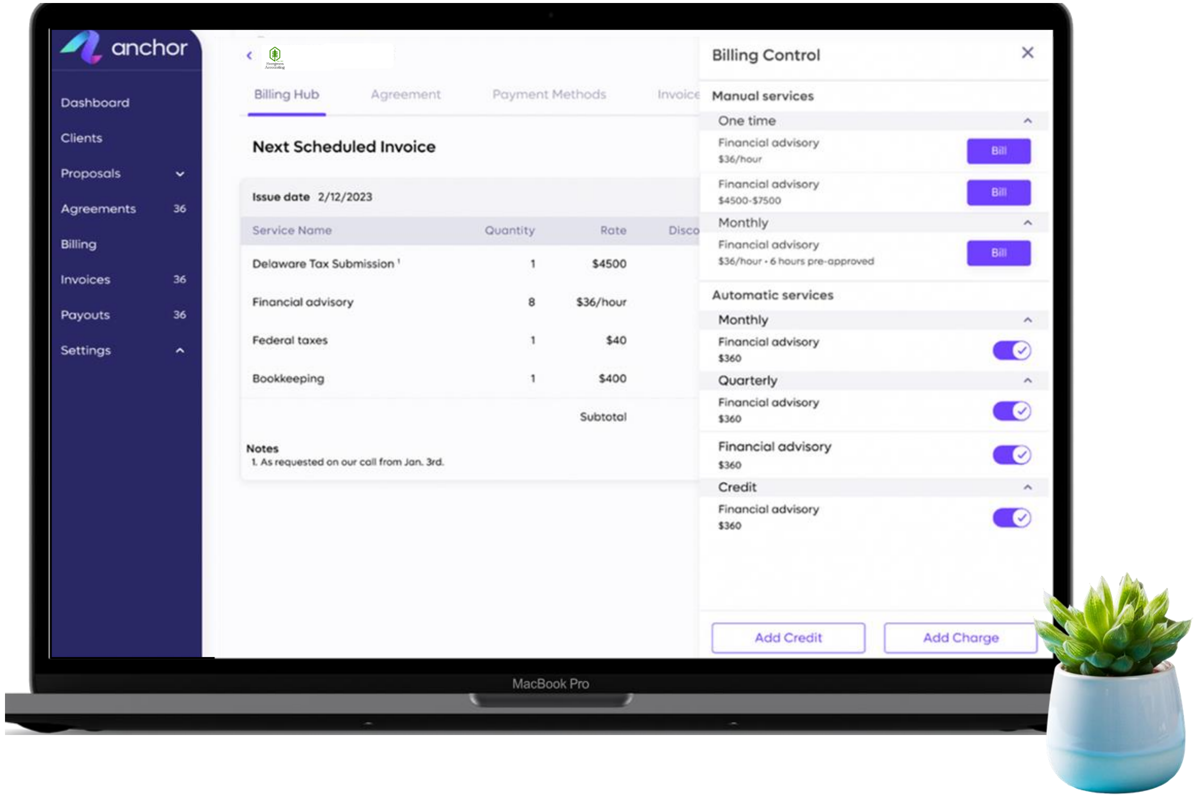


Invoicing

Harness the power of automated Invoicing

Whether it's recurring or one-time, automated or manual, fixed, by the hour or range-based, enjoy automated invoicing and have complete flexibility to modify, add or remove items from your invoices as needed.

- Automatically populates and sends invoices according to your terms, eliminating unnecessary manual work, saving time & money.
- Billing hub to manage all upcoming invoices, add out-of-scope charges and bill manual services when needed.



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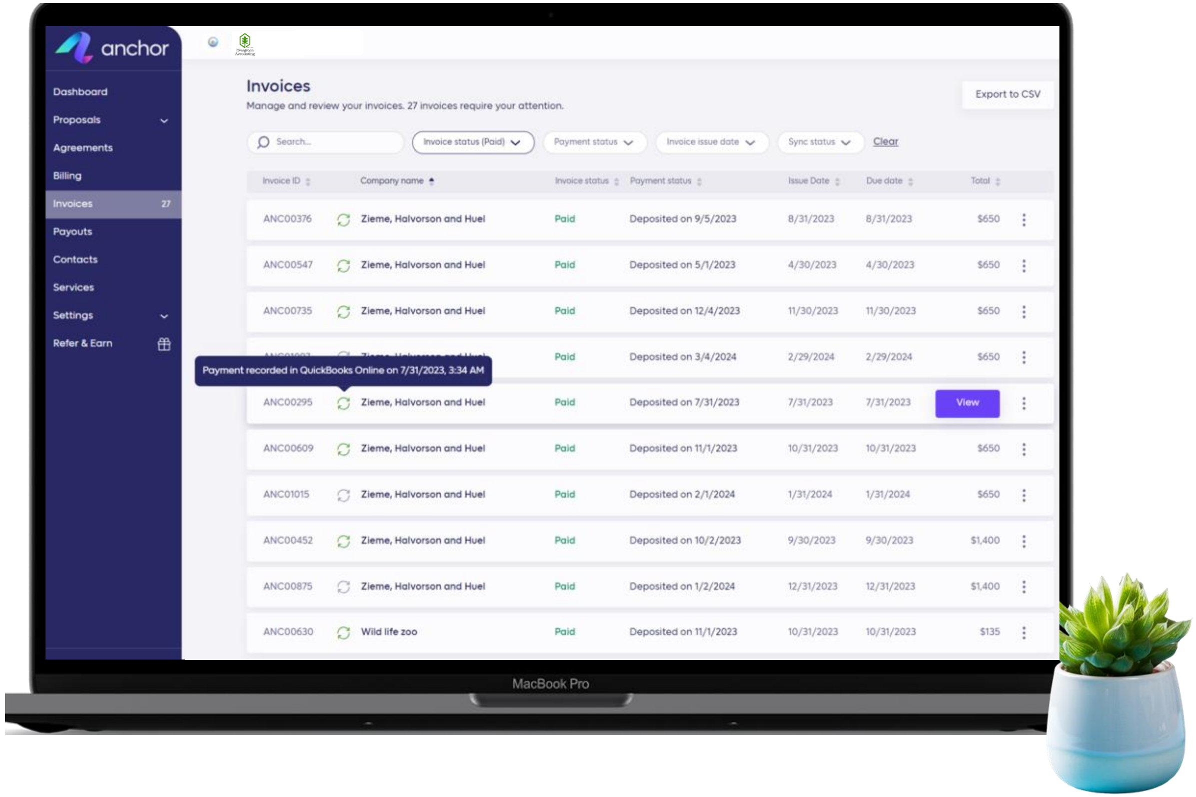
Payments

Client payments that are always paid on time, automatically!

Payment from clients are collected automatically and moved to your account automatically based on the agreement terms for zero DSO.

- Auto-charged via a pre-approved credit card or ACH
- Credit card fees paid by the client as default (or by you)
- Full visibility into payment status to track progress and manage failed or late payments.
- Payment process recorded is real time to QBO to Eliminate manual work & mistakes.



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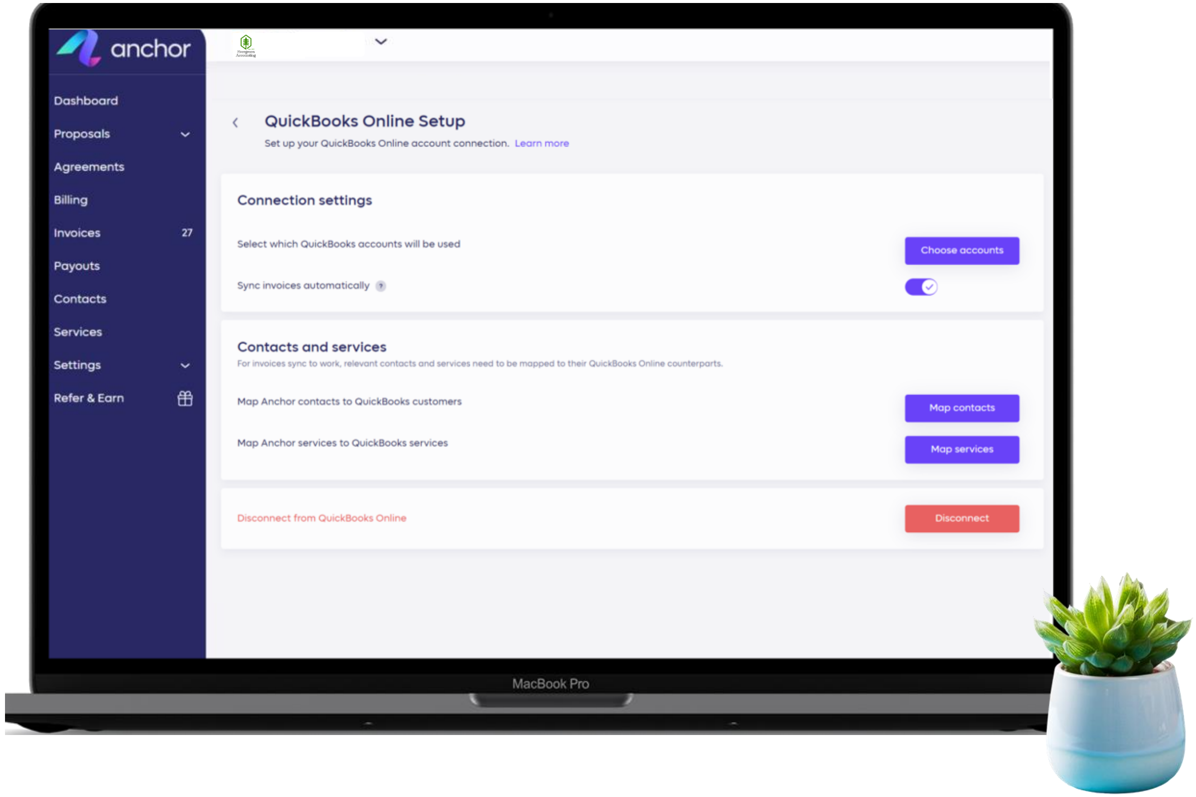
QuickBooks Online Integration

Stay fully synced with a native

QuickBooks Integration

Keep your QBO up-to-date with automatic real time sync of invoices, payments and deposits.

- Contacts and services are mapped to quickbooks to maintain accuracy
- Invoices are created and mapped automatically to QuickBooks
- Payments and deposits are automatically recorded on QuickBooks and reconciled with the respective invoice
- Anchor’s tracks invoices sync status in real time to make sure all is recorded in quickbooks accurately



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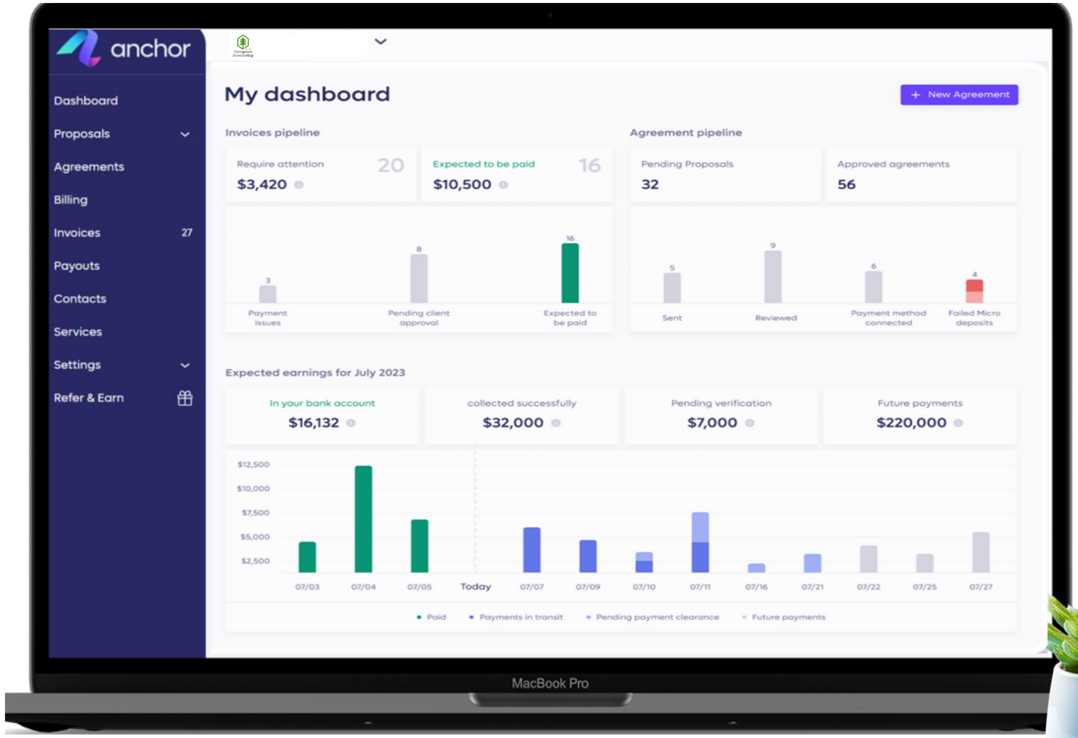
Dashboard

Stay in control with a responsive Dashboard

Peace of mind, control, KPIs. Once central view of the entire billing and collections process, from proposal to get paid.



- Track proposals status - sent, reviewed or approved
- Real time status of invoices and payments that are expected to be collected or require your attention
- View when upcoming payments will land in your account
- Click every place of the dashboard to be directed to take actions

With everything you deserve

One unified platform. No silos from proposal to paid. Always.

Proposals + eSignature
- Packages and add-ones
- Branded & beautiful
- High conversion
- Mobile first
- Simple to accept
- Fast onboarding
- Single source of truth

Auto invoicing
- Recurring
- Fixed
- Quantity
- Hourly
- Range
- Milestones
- Advances

Auto charge
- Fixed
- Hourly
- subscription
- Packages
- Add-ons
- Upon delivery
- Payment schedule
- Range pricing

Payment processing
- No merchant account
- Free ACH
- CC
- Secure
- Consistent

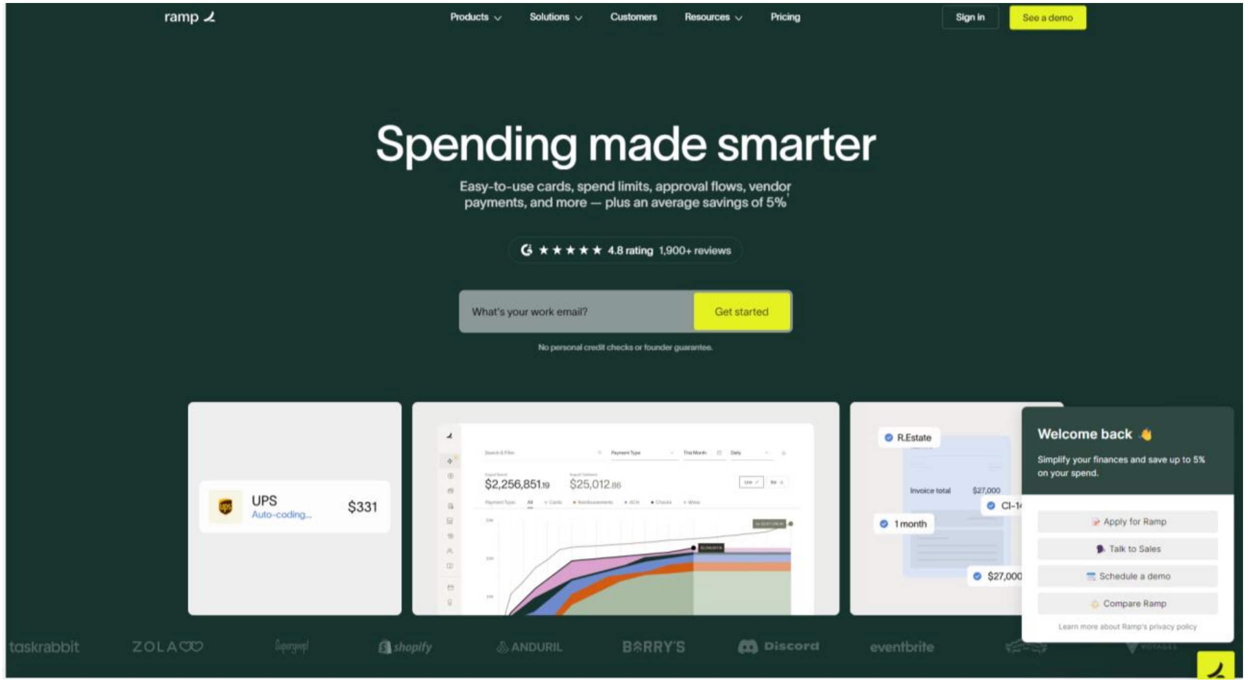
Auto QBO Sync
- Native API
- Automated
- Secured
- Reliable
- Transparent

Immediate ROI+
- Save cc fees
- Free you AR tasks
- No revenue leakage
- AR on autopilot
- 5 Apps in One

With simple, Pay-As-You-Go, Pricing

$5 per payment

Example: $3000 invoice	anchor	**Competition**
Advanced proposal tool, automated billing, collections and reconciliation, client portal and amendable agreements.	All included, no subscription $0	Multiple paid tools, and manual work to connect
Transaction cost	$5	$30 (1%)
Credit card fees	$0 (- 2.9%+30¢, paid by the client)	$130 (~3%, paid by the client)
Total cost per invoice	**$5**	**$30-$130**
Estimated (unbillable) time saved, per employee	**10%-20%**	**0**



So Many Options

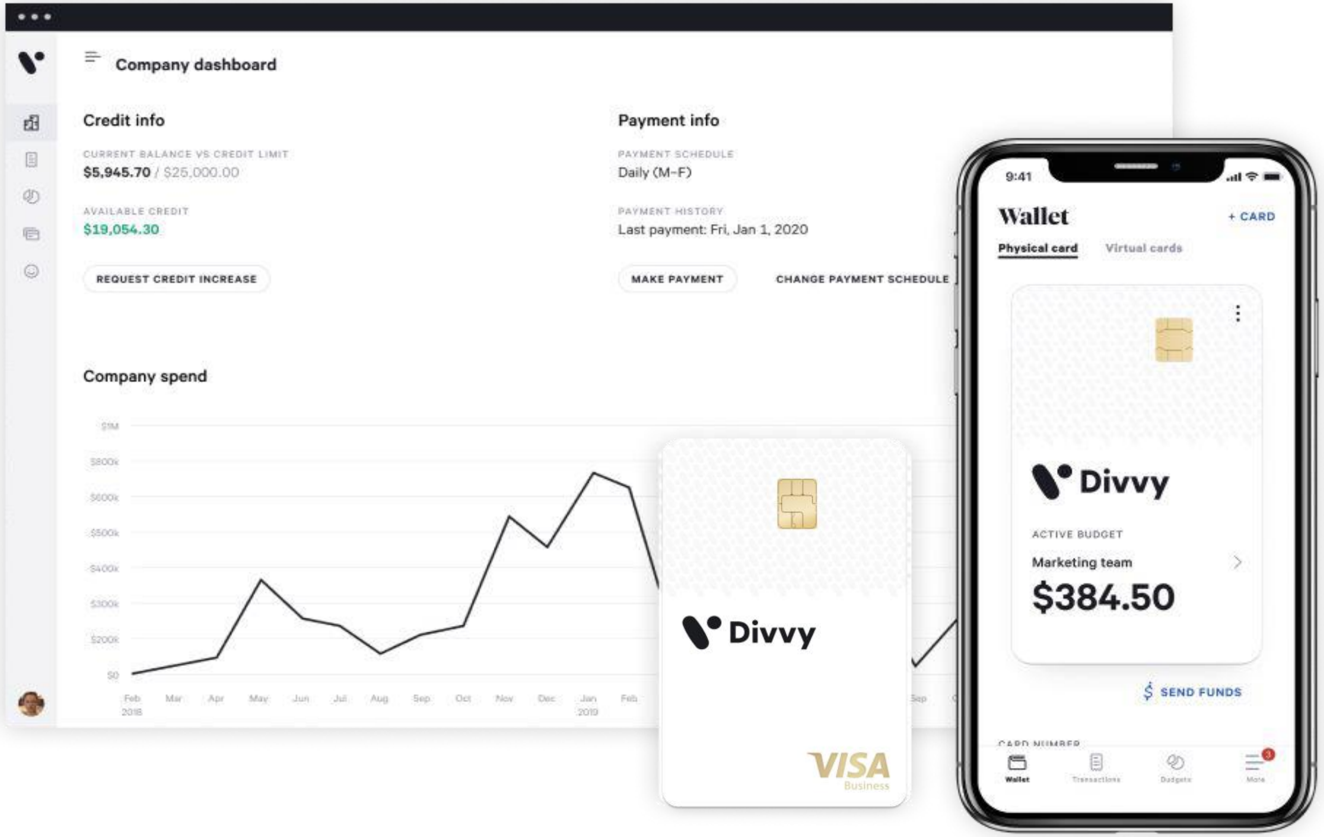
EXAMPLES OF SPEND MANAGEMENT

What Is Spend Management?

Spend management is the ability to proactively set controls and manage a business's cash outflow in real-time and in one centralized location, providing actionable insights to key financial decision makers.

Includes:

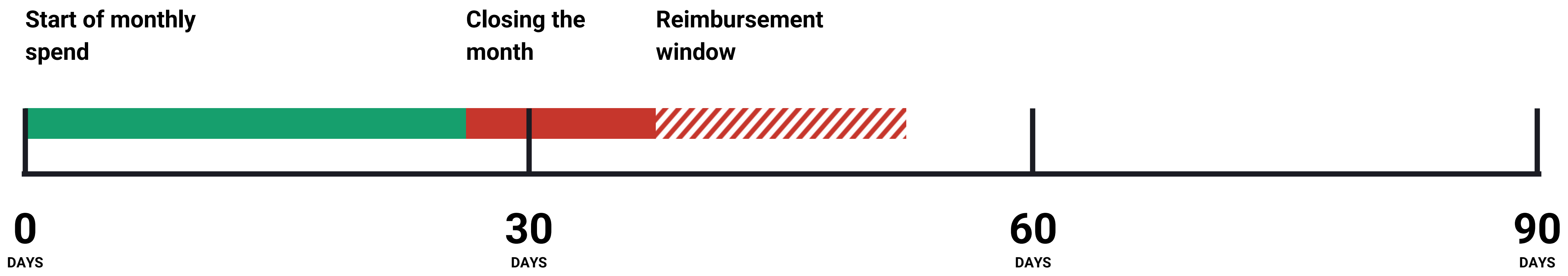
- Employee Spend
- Recurring Spend
- Payables
- Working Capital

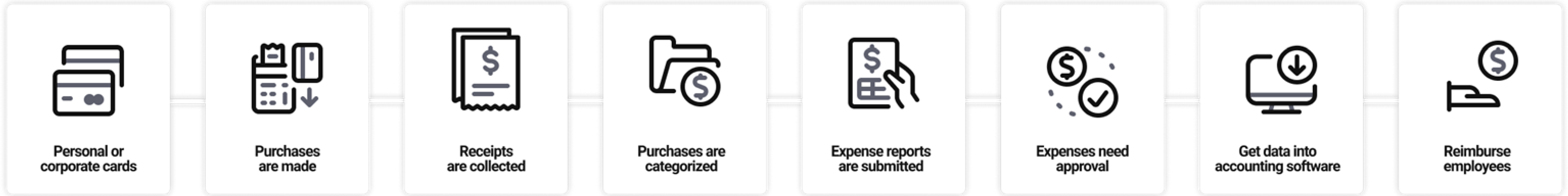


After-the-fact Expense Management vs. Real-time Spend Management

After-the-fact	**Reactive** Ad hoc reconciliation; not knowing what was spent until it's been spent	**Non-compliant Spend** Limited control on spend in the moment	**Time Wasted** Hours wasted on receipts, double reconciliation, and expense reports	**Complex Process** Manual steps, delayed visibility into spend
Real-time	**Proactive** Future planning based on real-time insights and reporting; planning spending before it happens	**More Control of Spend** Detailed spend controls with pre-defined budgets	**Significant Time Savings** No More Expense Reports	**Streamlined, User Friendly** Mobile reminders, real-time visibility and daily transaction sync

Today's Opaque And Slow Process Begs For A Better Solution





Top Spend Management Services

- Lola.com
- ProcurementExpress.com
- GEP SMART
- Visa Spend Clarity
- Procurify
- Tradeshift Go
- Airbase
- Workday Strategic Sourcing
- BILL Spend & Expense
- Corpay One
- Ramp

Virtual cards on the rise

$1 trillion in worldwide annual transaction volume projected by end of 2022

- Accenture

19% yearly growth in last 3 years

- Juniper Research

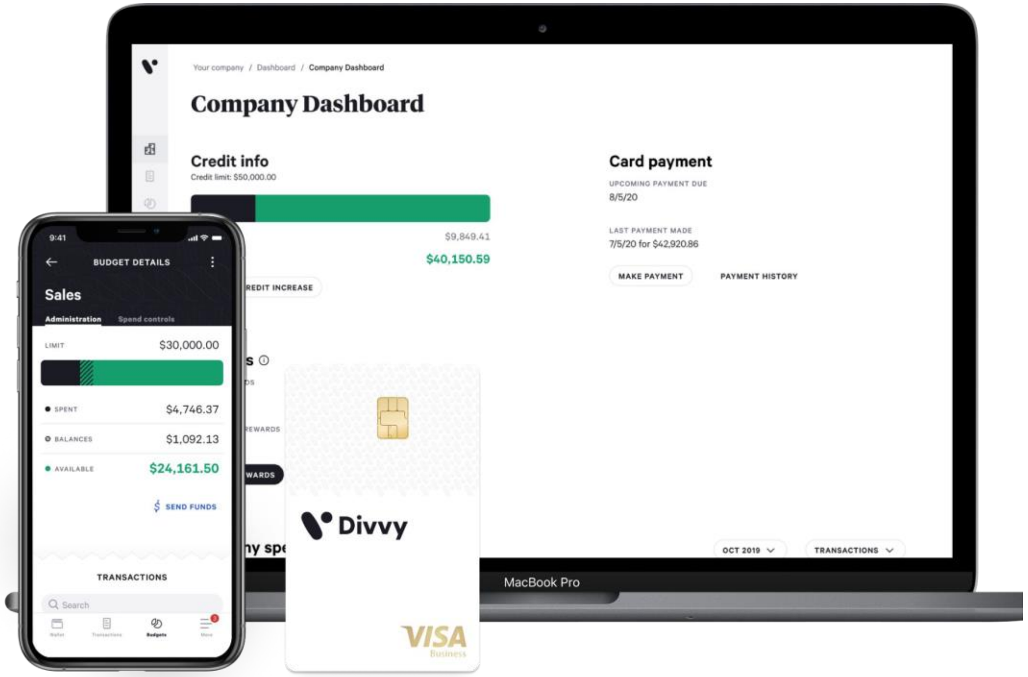
79% of BILL Spend & Expense customers are using virtual cards and comprise 93% of the cards issued last year.

Top Virtual Card Features

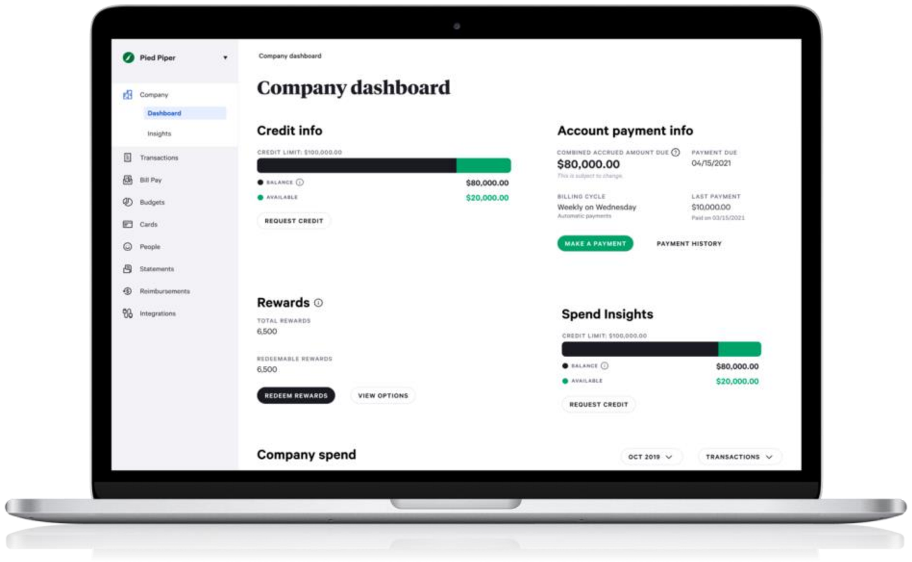
- **Real-time dashboards**
  See all spend activity as it happens in one place with dashboards and notifications
- **Spend limits**
  Set budget constraints for each virtual card
- **Recurring limits**
  Choose specific amounts to automatically load onto cards each month
- **Single or limited-use**
  Limit cards to a single payment or set to expire at a certain date

What Is BILL Spend & Expense?

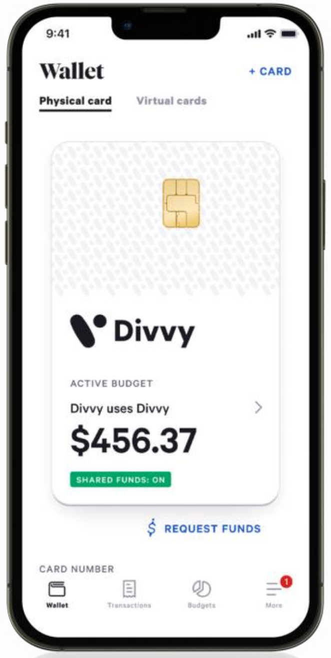
- BILL Spend & Expense combines seamless expense and spend management software with the world's smartest business card, bringing all spending data and expense management into one place
- With BILL Spend & Expense, control spend, save time — and get back to your business



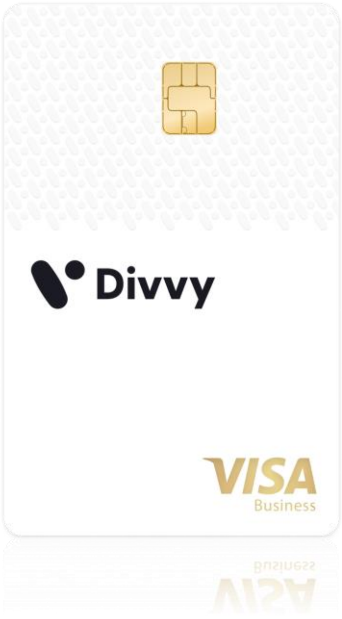
The All-in-one, Real-time, And Free Spend Management Solution



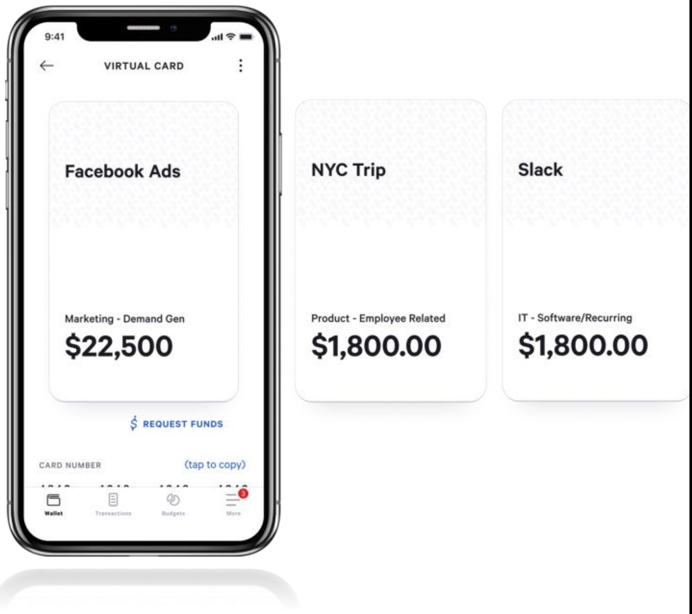
Web App



Mobile App



The BILL Spend & Expense Visa Business Card



Virtual Cards

BILL Spend & Expense vs. Traditional Expense Tools

BILL Spend & Expense advantages	**Proactive Control** Planned spending and approval before it happens	**Real-Time Visibility** Real-time spend visibility and tracking enables additional control and quick action	**Efficient** Real-time coding and categorization eliminates expense reports	**Accurate** Auto-categorization and daily transaction sync to accounting softwares
	⬆	⬆	⬆	⬆
Traditional tools	**Reactive** Difficulty in setting enforceable budgets as part of financial planning	**Delayed Action** No real-time control of spend	**Time Consuming** Hours spent chasing receipts, double reconciliation, and expense reports	**Human Error** Manual steps increases change of inaccuracies

Virtual Cards

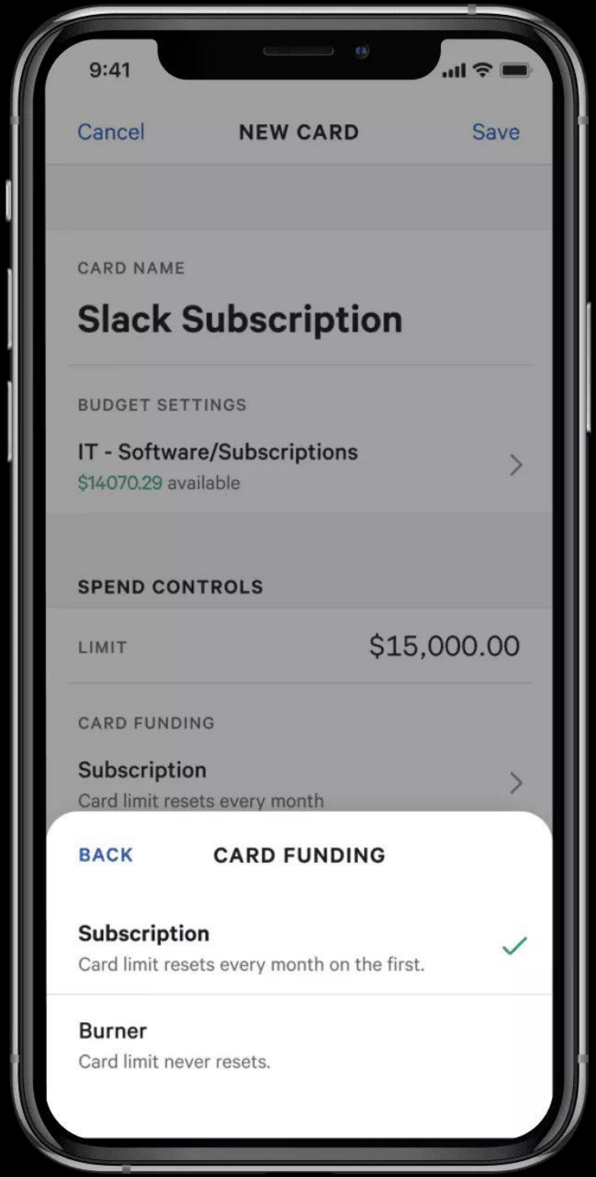
Two card types for any business need.

One-time use burner cards

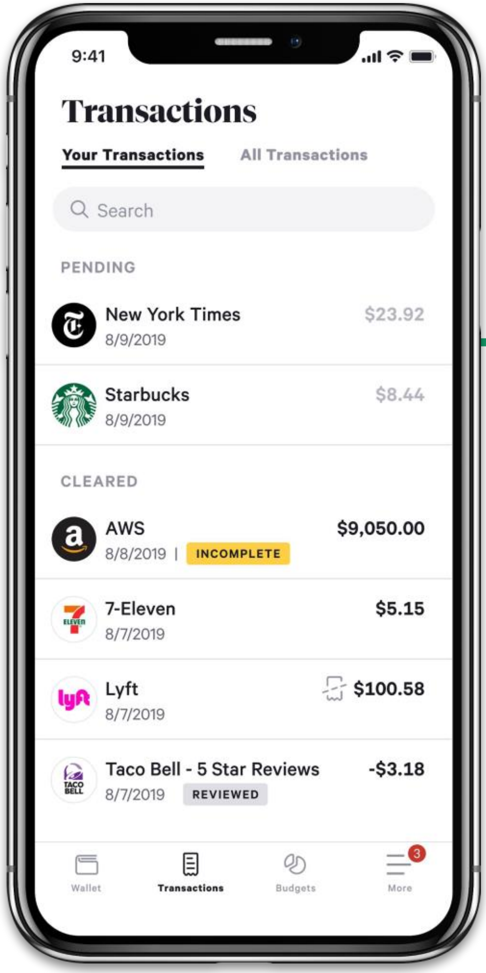
These temporary cards are for one-time use, budgets with an expiration date, or projects with limited spend.

Recurring subscription cards

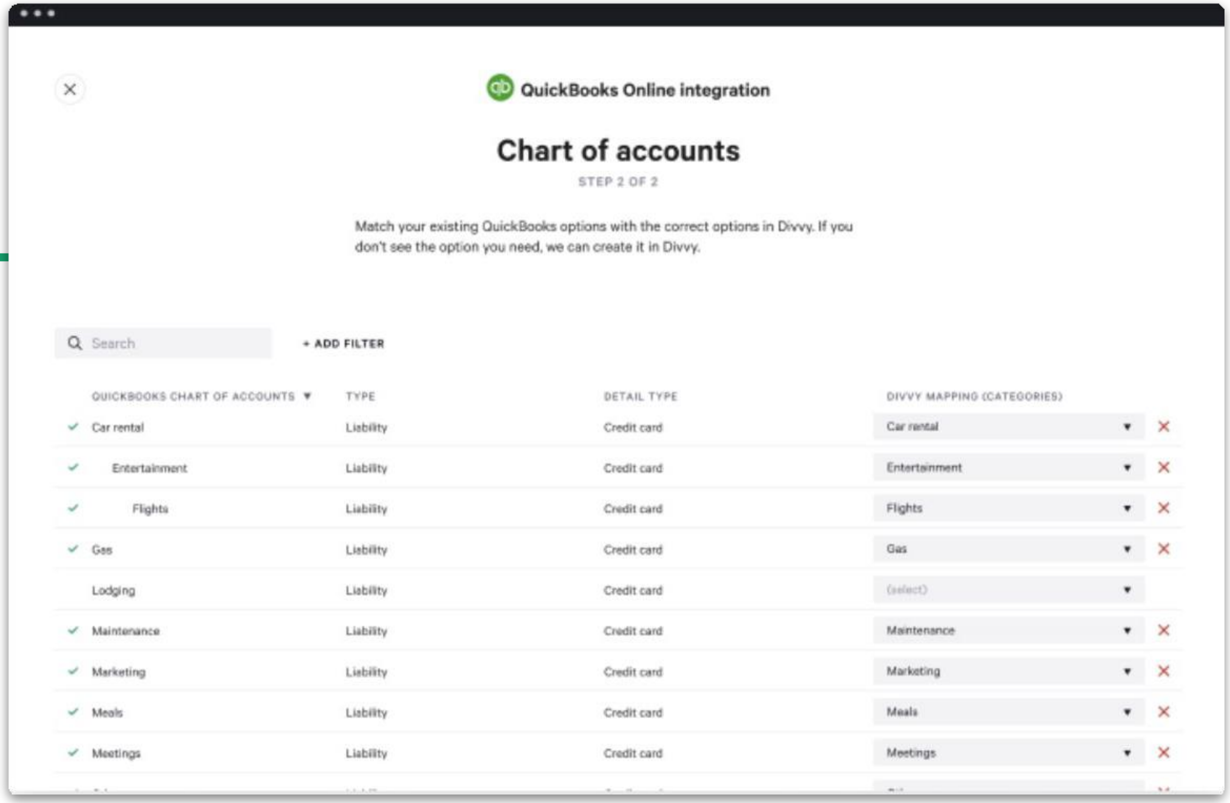
Set up monthly funds for recurring payments with custom limits.



Expense & Reconcile In Real-time



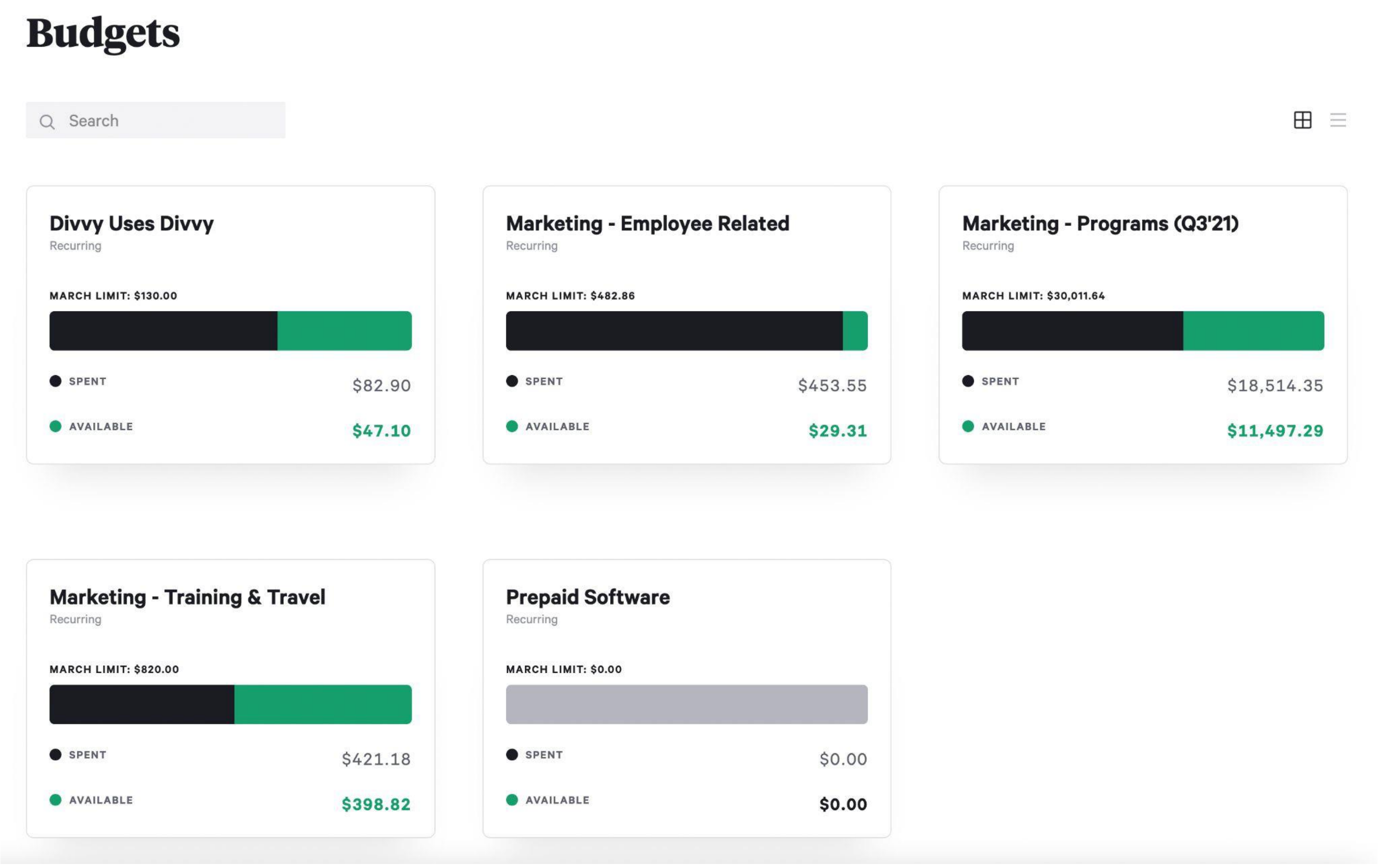
Swipe to books

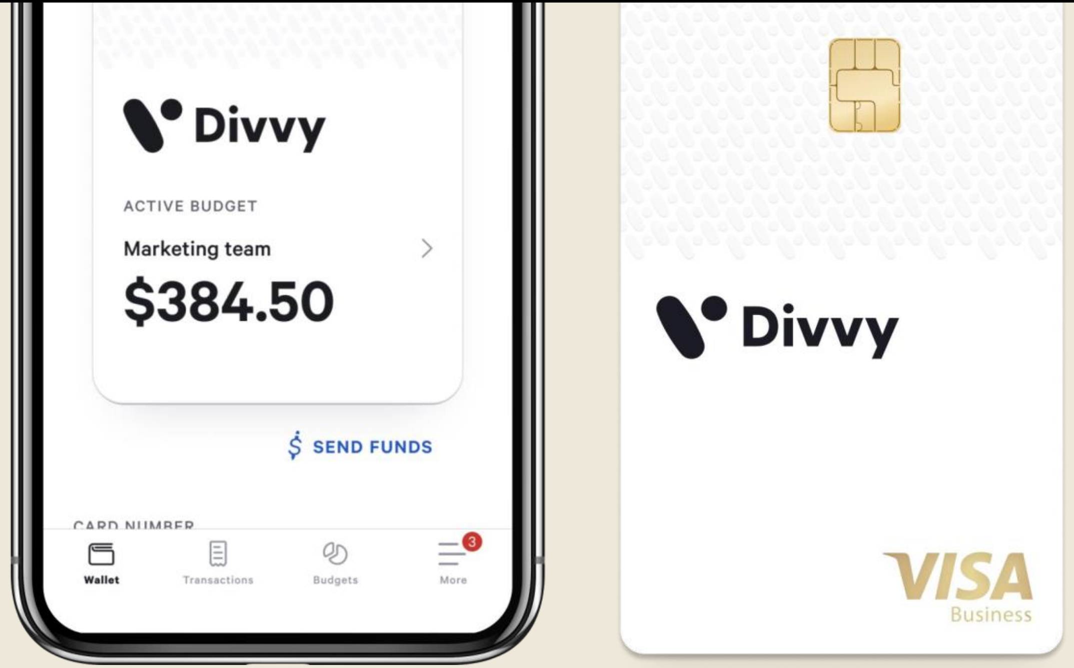


Absolute Adherence To Budget Numbers

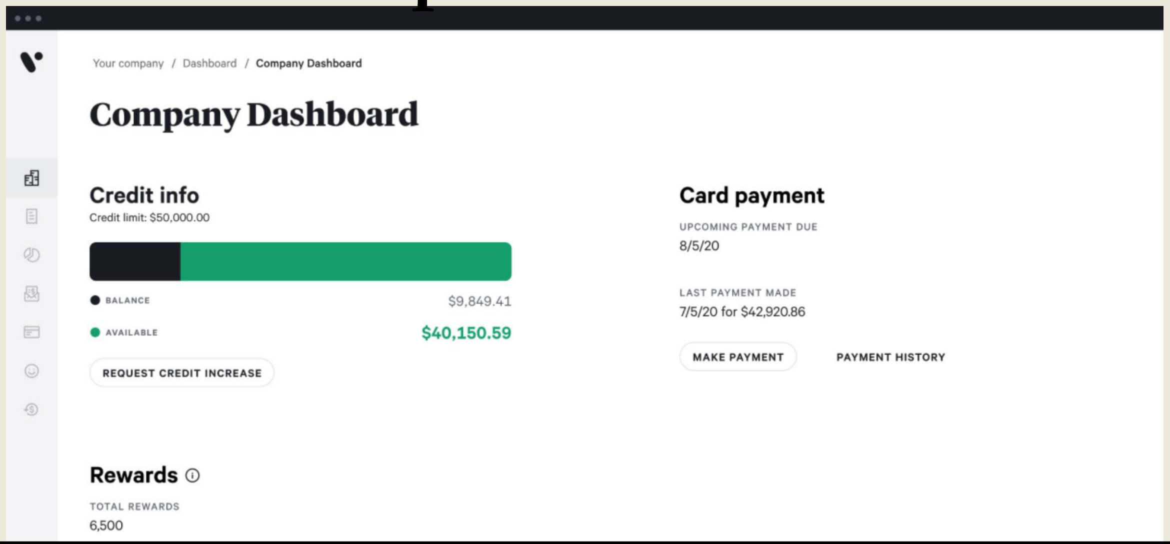
- Imagine if your firm could guarantee a client would never exceed their budget limits. BILL Spend & Expense's enforceable budgets enable you to offer next-level financial services

Budgeting Control And Flexibility





BILL Spend & Expense is free.



Here's what you get with BILL Spend & Expense:

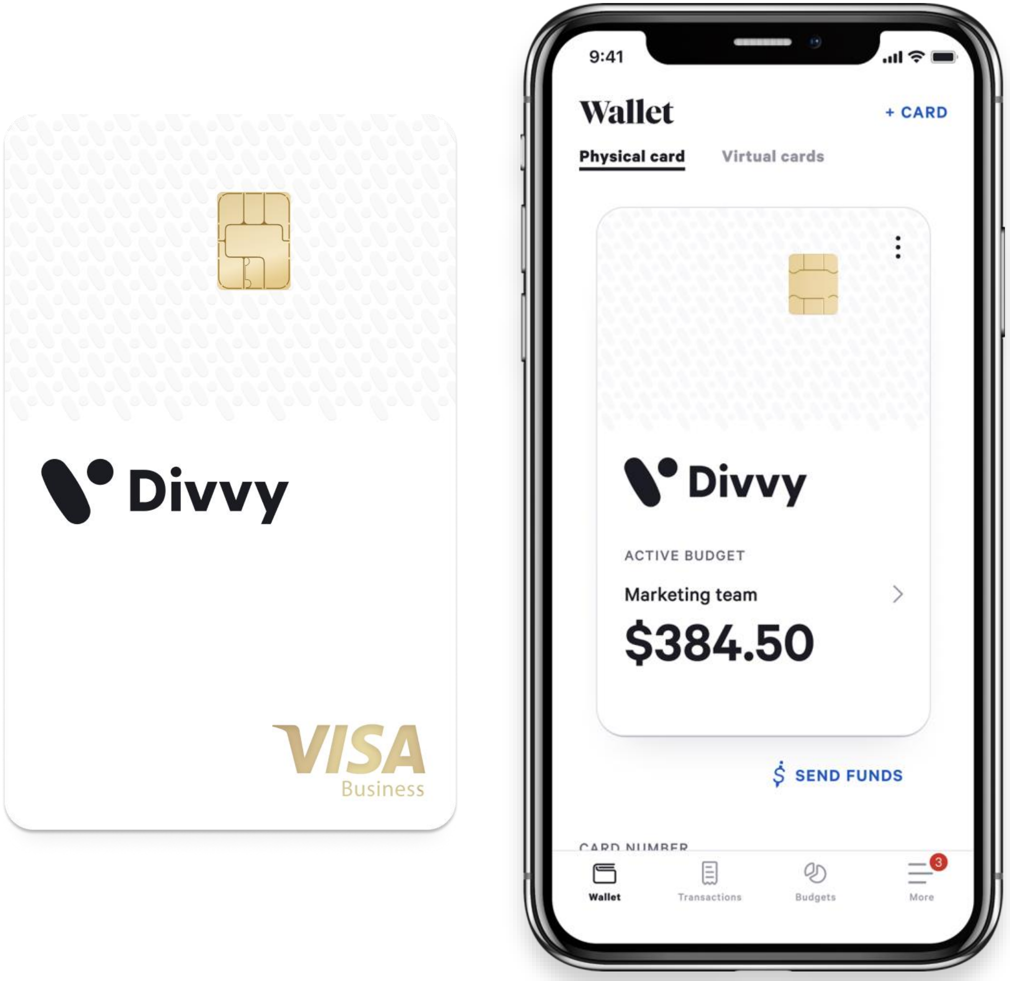
- Cards for all
- Business credit you'll love
- Secure virtual cards
- Enforceable budgets
- Instant categorization
- Seamless integrations
- Dispute resolution
- Spend notifications
- Easy card management
- Simple reimbursements
- Live transaction dashboard
- Transaction Review

Unifying The Fintech Landscape

Will replace	*Can replace*	*Will enhance*
Corporate Credit & Virtual Cards	Travel	Budgeting
Expense Management	AP/Bill Pay	Accounting

BILL Spend & Expense Platform

How Companies Use BILL Spend & Expense



Rip and replace

Use the whole platform and we help your whole company spend smarter

Department specific

Use BILL Spend & Expense in one or more departments that need spend and expense management tools

Specific tools

Use one or more BILL Spend & Expense tools like virtual cards or Bill Pay in tandem with your existing processes and software

BILL Spend & Expense Reference Account

Calendly

With BILL Spend & Expense

- One solution that does the work of three
- 7-10 hours a month saved on expense reporting
- Utilizing BILL Spend & Expense reimbursements and budgets to manage spending in real-time
- BILL Spend & Expense physical and virtual cards and budgets for every employee
- Employees feel empowered and responsible for their spending

“We were using American Express before, but that brought the typical ‘big bank’ issues.”

– Jonathan Rue, Senior Finance/Accounting Analyst

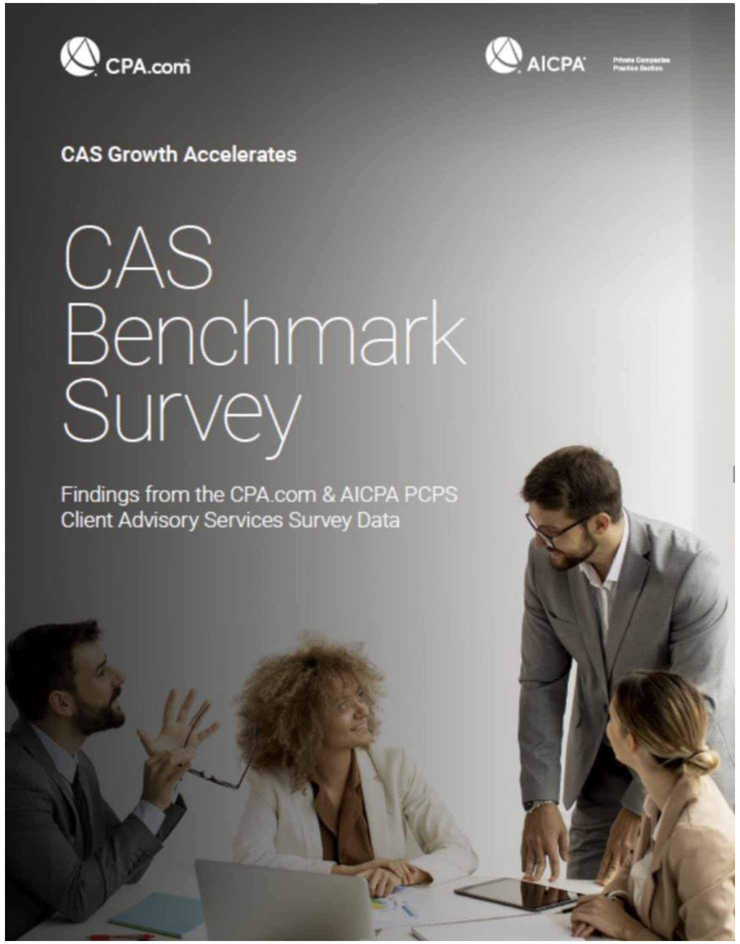
BILL Spend & Expense Accountant Advisor Program

- Free to use - $0 subscription fee
- Continuous close and reduce time spent on month-end reconciliations
- Gain spending insights that inform advisory services
- Receive educational content and programs from CPA.com on spend management and next generation CAS practices
- Get dedicated support by account managers to assist you and your clients
- Have co-marketing opportunities for your firm

Growth Trajectory For CAS Practices

- Client Advisory Services (CAS) range from basic outsourced accounting services to Virtual CFO. The CAS Benchmark Survey reported strong demand and growth for CAS practices:
  - 20% median net client fee growth rate
  - 47% profit margins for Top firms; 34% for all others
  - 55% of firms saw a revenue increase as a result of the work that came out of the pandemic

CPA.com and AICPA PCPS Client Advisory Services Benchmark Survey

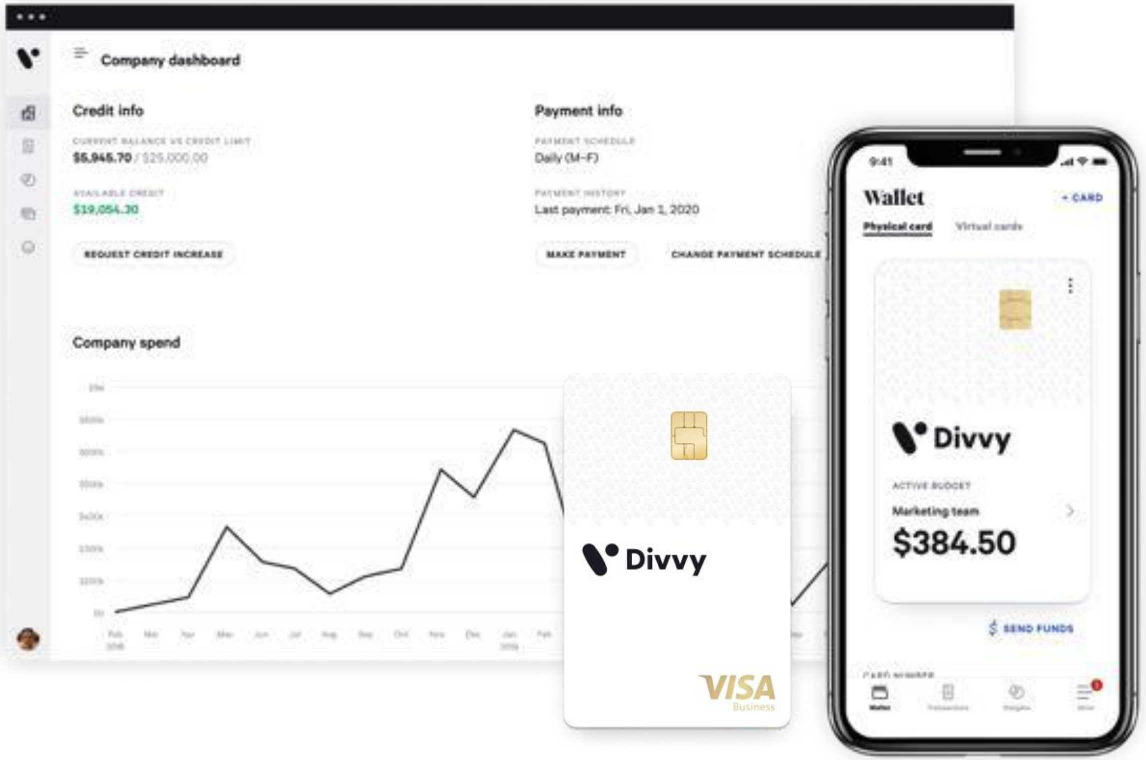


Good for your firm.
Great for your clients.

- Grow your offerings as a firm to earn more business from existing clients.
- Increase fin-tech expertise to attract new customers.
- Streamline your internal processes for much greater efficiency.
- Reduce costs for your firm and your clients.
- Earn revenue sharing on a FREE product.

Learn more at: **https://www.bill.com/referral-partners**

bill SPEND & EXPENSE | Partners



PREFERRED PARTNER OF CPA.COM FOR SPEND MANAGEMENT

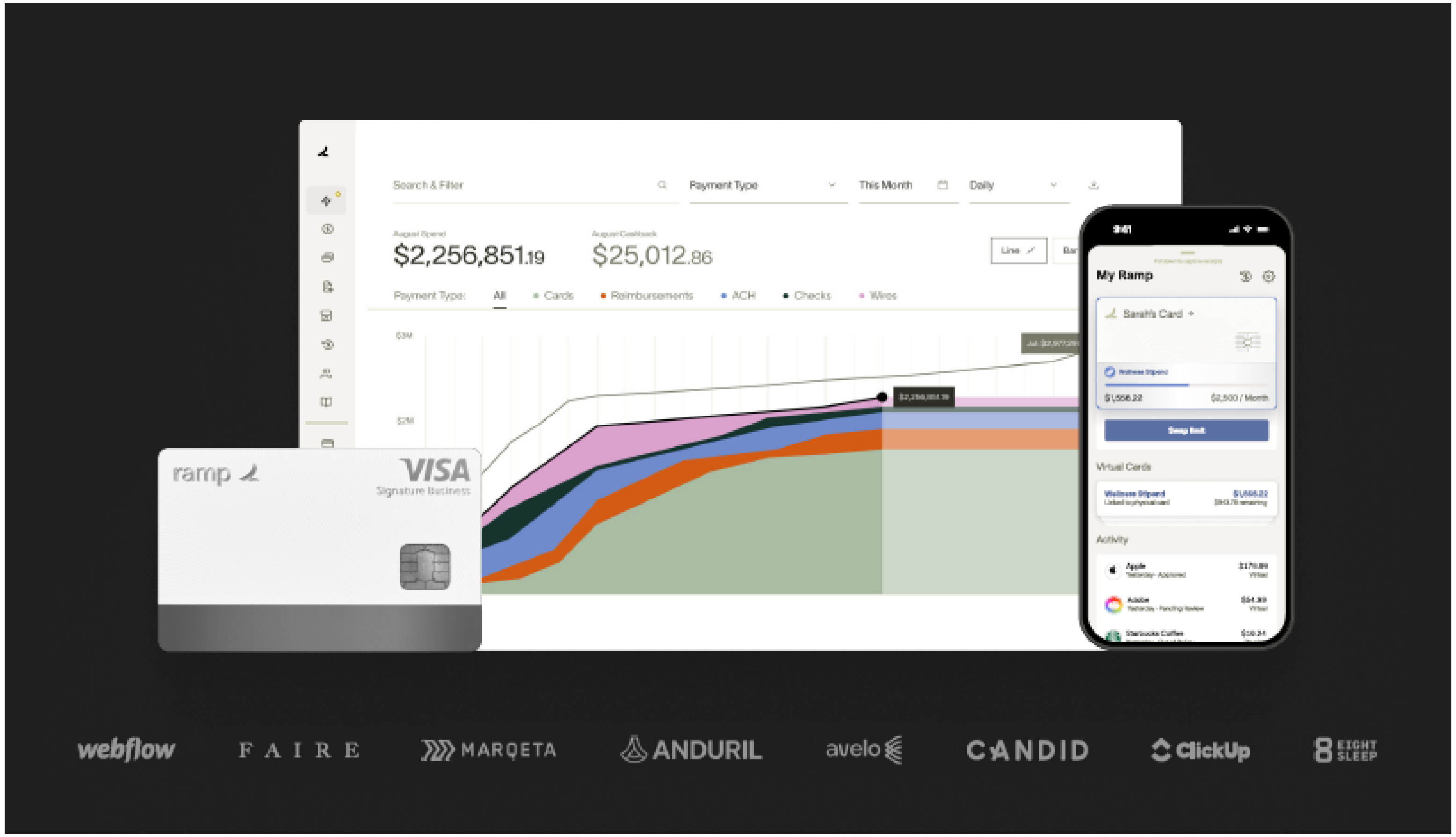
13,500+ customers use BILL Spend & Expense to spend smarter

BILL + BILL Spend & Expense: **Over 10,000 SMB customers** served

Ramp

For Accountants: Integrate accounting systems
to streamline reconciliation and eliminate tedious tasks while accessing the event history of every transaction.

ramp Time is money. Save both.

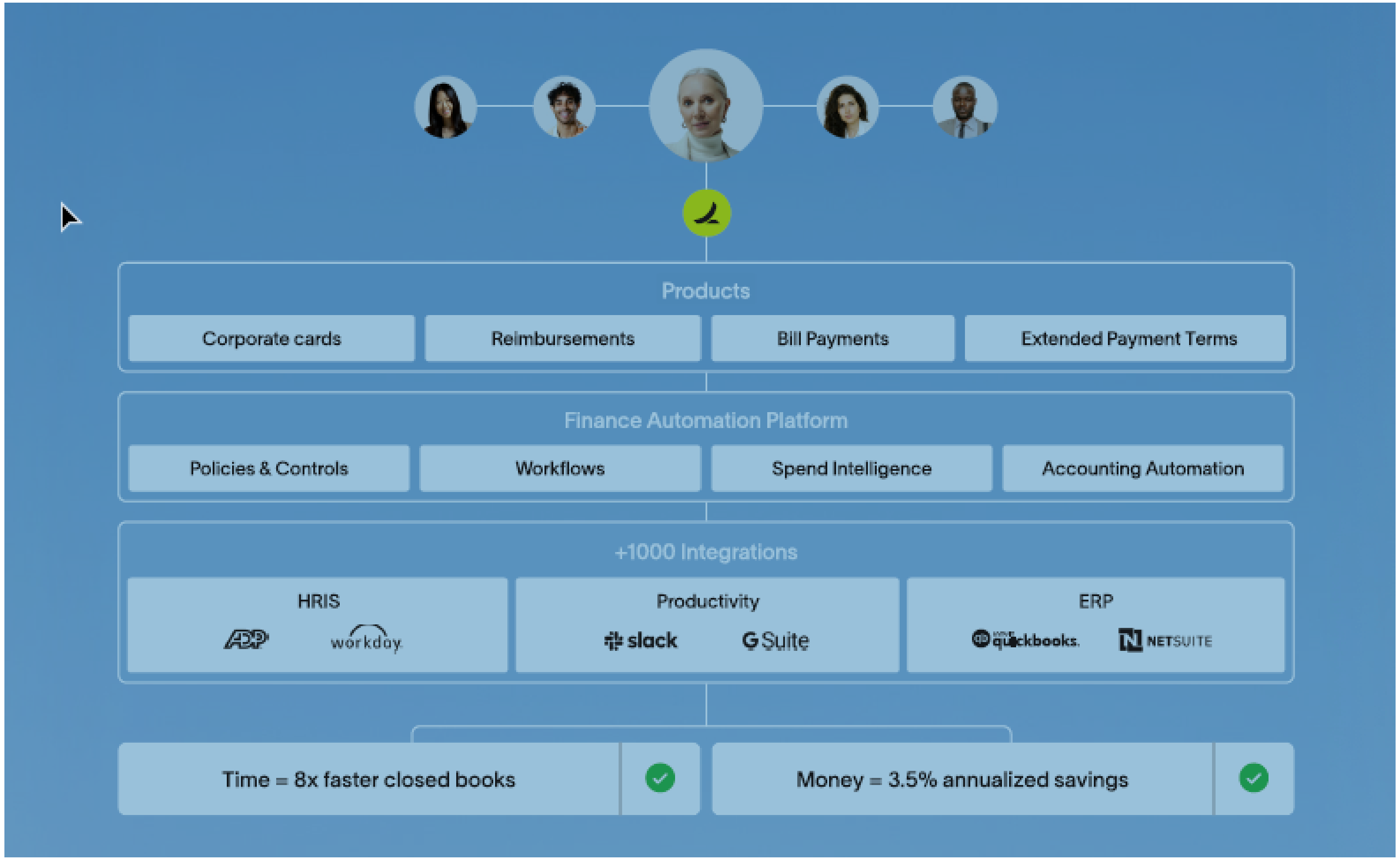


Corporate Card & Spend Management, Reimagined for Unmatched Growth

Ramp is the world's first finance automation platform designed to save you time and money. Ramp beautifully reimagined corporate cards, expense management, and accounts payable, so you can control spend, eliminate busywork, and empower teams. Say goodbye to expense reports, pay vendors in record time, and automate finance tedium all while saving an average of 3.5% and closing your books 8x faster.

Transform Your Finance Operations With Ramp

- Policies & Controls
- Workflows
- Spend Intelligence
- Accounting Automation
- $0-15/user



So Many Options

WHAT ABOUT E-SIGNATURES?

Top Advantages Of Using eSignature

- **Time savings**: eSignatures streamline the document signing process, eliminating the need to print, sign, scan, and mail physical documents, resulting in faster turnaround times for agreements, contracts, and approvals
- **Cost savings**: By reducing the reliance on paper, printing, and postage, eSignature solutions can help organizations save money on document-related expenses
- **Enhanced security**: Reputable eSignature platforms employ advanced security measures, such as encryption, audit trails, and secure storage, to protect sensitive information and ensure the integrity of signed documents
- **Reduced errors**: eSignature solutions minimize errors associated with document handling, such as missing signatures, misplaced pages, or incorrect information
- **Legally binding**: In many countries, including the United States, eSignatures are legally recognized and carry the same weight as traditional, handwritten signatures, if they meet specific requirements outlined in laws such as the ESIGN Act and UETA
- **Improved efficiency**: eSignature solutions often include features such as document tracking, templates, and workflow automation, which can help streamline document management and collaboration processes
- **Remote accessibility**: eSignature platforms enable users to sign documents from anywhere, at any time, using various devices, including smartphones, tablets, and computers. This is particularly beneficial for remote or distributed teams and organizations operating across multiple locations
- **Environmental benefits**: By reducing the need for paper resources, eSignature solutions contribute to more sustainable and environmentally friendly business practices
- **Better organization**: eSignature platforms typically offer digital storage and organization features, making it easier to manage and retrieve signed documents as needed
- **Integration with other tools**: Many eSignature platforms can be integrated with other business applications, such as CRM, project management, and document management systems, improving efficiency and streamline workflows

Top eSignature Tools

- **DocuSign**: A widely used eSignature solution that offers secure and legally binding electronic signatures, document tracking, and integrations with various platforms, such as Microsoft, Google, and Salesforce
- **Adobe Sign**: A comprehensive eSignature solution from Adobe, offering document signing, tracking, and management, as well as integrations with popular business applications, like Microsoft Office, Salesforce, and Workday
- **Dropbox Sign**: A user-friendly eSignature platform that provides secure electronic signatures, audit trails, and integrations with popular applications, such as Google Workspace, Dropbox, and Salesforce
- **SignNow**: An eSignature solution that offers document signing, tracking, and management features, with a focus on ease of use and integration with various platforms, including Microsoft, Google, and Oracle
- **PandaDoc**: A document automation platform that includes eSignature capabilities, along with proposal creation, contract management, and workflow automation features
- **OneSpan Sign (formerly eSignLive)**: A secure eSignature solution that offers electronic signatures, document tracking, and audit trails, with integrations to various business applications, such as Salesforce, Microsoft Dynamics, and IBM
- **SignEasy**: A user-friendly eSignature platform that provides electronic signatures, document tracking, and management, along with integrations to popular applications like Google Workspace, Microsoft Office, and Dropbox
- **Zoho Sign**: A part of the Zoho suite of business applications, Zoho Sign provides eSignature capabilities, document tracking, and integrations with other Zoho applications, as well as popular platforms like Microsoft Office and Google Workspace
- **SignRequest**: An eSignature solution that offers secure electronic signatures, document tracking, and storage, with integrations to popular business applications, such as Google Workspace, Salesforce, and Dropbox
- **Docsketch**: An eSignature and document tracking platform that offers legally binding electronic signatures, document workflows, and integrations with various business applications, like Google Drive and Dropbox

Most Common eSignature In Firms

- Adobe Sign
- DocuSign
- CCH (OEM-Assure Sign)
- Doc.It (OEM DocuSign)
- cPaperless SafeSend Suite/Returns/Exchange/Signatures (their product)
- Liscio (OEM Adobe Sign)
- Right Signature (Cloud.com ShareFile)
- Thompson (OEM Adobe Sign)
- Verdocs (cannot use with 8879, no KBA)
- Zoho Sign (cannot use with 8879, no KBA)
- Dropbox Sign (cannot use with 8879, no KBA)

Top Features Of eSignature Tools

- **Electronic signatures**: The core functionality of eSignature software is the ability to create, send, and capture legally binding electronic signatures on digital documents
- **Document templates**: Many eSignature platforms provide customizable templates that can be used to streamline the creation of frequently used documents, such as contracts, agreements, or forms
- **Document tracking and notifications**: eSignature software often includes tracking features that allow users to monitor the progress of documents throughout the signing process, as well as receive notifications when signatures are added or required actions are taken
- **Audit trails**: To ensure compliance and security, eSignature platforms often provide detailed audit trails that record the history of document actions, such as when and by whom a document was viewed, signed, or modified
- **Workflow automation**: Workflow automation features enable users to define and automate document signing processes, routing, and approvals
- **Integration with other tools**: eSignature software often integrates with popular business applications, such as CRM, project management, and document management systems, to streamline workflows and improve efficiency
- **Mobile accessibility**: Most eSignature platforms offer mobile apps or mobile-optimized web interfaces, enabling users to sign and manage documents from their smartphones or tablets, regardless of their location
- **Secure storage and organization**: eSignature solutions typically provide secure, cloud-based storage for signed documents, making it easy to organize, access, and manage documents from anywhere
- **Custom branding**: Some eSignature platforms offer custom branding options, allowing organizations to personalize the signing experience with their logo, colors, and messaging
- **Authentication and security**: eSignature software employs advanced security measures, such as encryption, MFA, and secure document storage, to protect sensitive information and ensure the integrity of signed documents

Top eSignature Uses For CPA Firms

- **Engagement letters**: eSignature software can be used to prepare, send, and collect signed engagement letters from clients, outlining the scope of services, fees, and terms of the agreement
- **Tax returns**: CPA firms can use eSignature solutions to obtain electronic signatures on tax returns and related documents, ensuring timely filing and compliance with tax regulations
- **Financial statements**: eSignature platforms can be used to securely send and collect signatures on financial statements, such as balance sheets, income statements, and cash flow statements
- **Audit confirmations**: Auditors can use eSignature software to send and receive signed audit confirmations from clients, banks, and other third parties, streamlining the audit process
- **Client onboarding forms**: eSignature solutions can be utilized to simplify the client onboarding process, enabling new clients to complete and sign necessary forms and agreements digitally
- **Power of attorney (POA) forms**: CPA firms can use eSignature platforms to obtain signatures on POA forms, granting them the authority to act on their clients' behalf for specific financial or tax-related matters

Top eSignature Uses For CPA Firms

- **Payroll and HR documents**: eSignature software can be employed for signing payroll forms, employee contracts, and other HR-related documents, ensuring accurate record-keeping and compliance with employment laws
- **Non-disclosure agreements (NDAs)**: CPA firms can use eSignature solutions to secure signed NDAs from employees, contractors, and clients, protecting sensitive information and intellectual property
- **Internal approvals and policies**: eSignature platforms can be used to manage and track approvals for internal documents, such as expense reports, policy updates, or procedural changes
- **Business contracts and agreements**: CPA firms can leverage eSignature software for managing and signing various business contracts and agreements, such as partnership agreements, service contracts, or vendor agreements
- **Management Representation Letters**: addressed to a federal entity's external auditor, signed by senior management, the letter attests to the accuracy of the financial information that the federal entity has submitted to the auditors for their analysis

Typical eSignature Pricing

- **Free plans**: Some eSignature platforms offer a free plan with limited features and usage, often including a restricted number of documents per month, access to basic features, and a limited number of users. Free plans are generally suitable for individuals or small businesses with low-volume signing needs
- **Monthly or annual subscription plans**: Many eSignature providers offer tiered subscription plans, with pricing based on the number of users, features, and the allowed number of documents per month. These plans can range from as low as $10 per user per month for basic plans to $50 or more per user per month for advanced plans with additional features, such as custom branding, integrations, and workflow automation. Annual subscriptions often come with discounts compared to monthly plans
- **Pay-as-you-go or per-document plans**: Some eSignature solutions offer pay-as-you-go or per-document pricing, where you pay a fee for each document or signature processed. This can be a cost-effective option for businesses with variable or low-volume signing needs
- **Enterprise plans**: For larger organizations or those with specific requirements, many eSignature providers offer custom enterprise plans that include volume discounts, dedicated support, advanced security features, and custom integrations. Pricing for enterprise plans is typically negotiated on a case-by-case basis
- All said, a range $0.75 to 5.00 is common

Summary

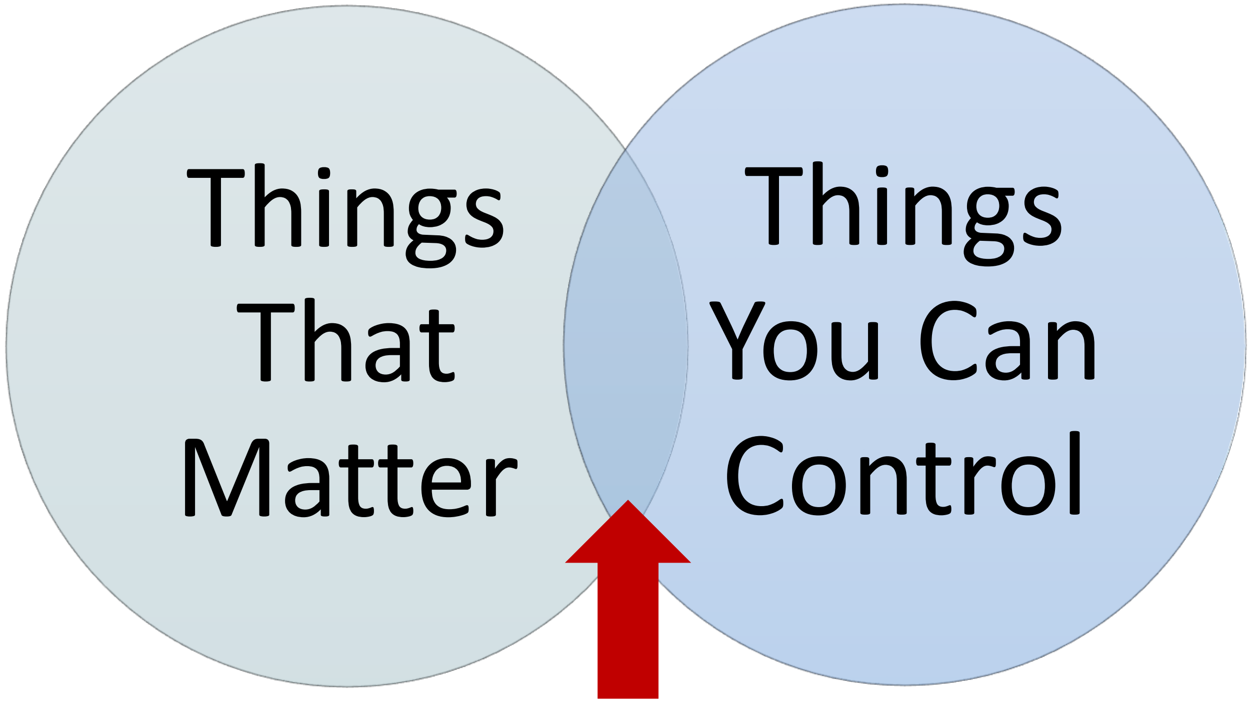
- Portals have different capabilities, but solutions like Liscio, Suralink, and SmartVault have features that lead the market
- A variety of accounts payable and spend management vendors have different options for payment processes, many of which are low-cost or free
- Tax professionals need KBA for 8879's and everyone benefits from the ability to place multiple eSignatures at once

Meetings, Productivity

SUPPLEMENTAL MATERIALS

Don’t Be Busy. Be Productive!

Focus Delivers Productivity



What You *Should* Focus on!

Be Productive Working From Home!

- Establish a routine
  - Set alarm clock
  - Shower, shave or put on makeup
  - Dress for work
- Create structure
  - Dedicated work area
    - Used exclusively for work
    - "Mini" home office
  - Clear the clutter
  - Maintain a To Do List with 1 to 3 action items
- Move around
  - Plan in physical activity
  - Walk around during conference calls
  - Standing up to make a pitch raises enthusiasm
- Reduce stress
  - Identify your best stress reliever and use it
    - Listen to music
    - Controlled breathing

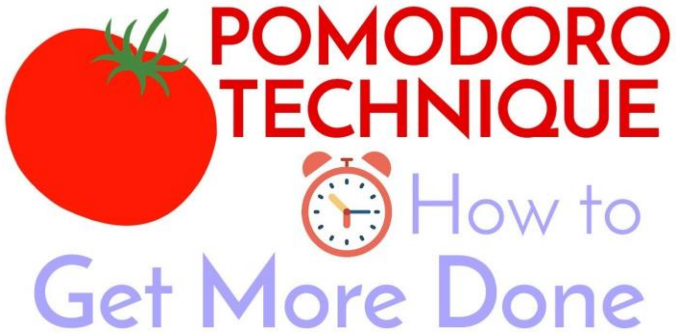
Forbes

Pomodoro Technique – Focus Between Breaks

1. Choose a task
2. Work on it for 25 minutes
3. After 25 minutes, put a check mark on a sheet of paper to mark the completion of a Pomodoro sprint
4. Take a five-minute break
5. Repeat the process
6. After every four Pomodoro sprints, take a 30-minute break
7. Continue this throughout the day until your workday is over

Pomodoro Incremental Objectives

- Find Out How Much Effort an Activity Requires
- Cut Down on Interruptions
- Estimate the Effort for Activities
- Get the most out of each single Pomodoro
- Set a Timetable
- Apply the technique to improve other processes

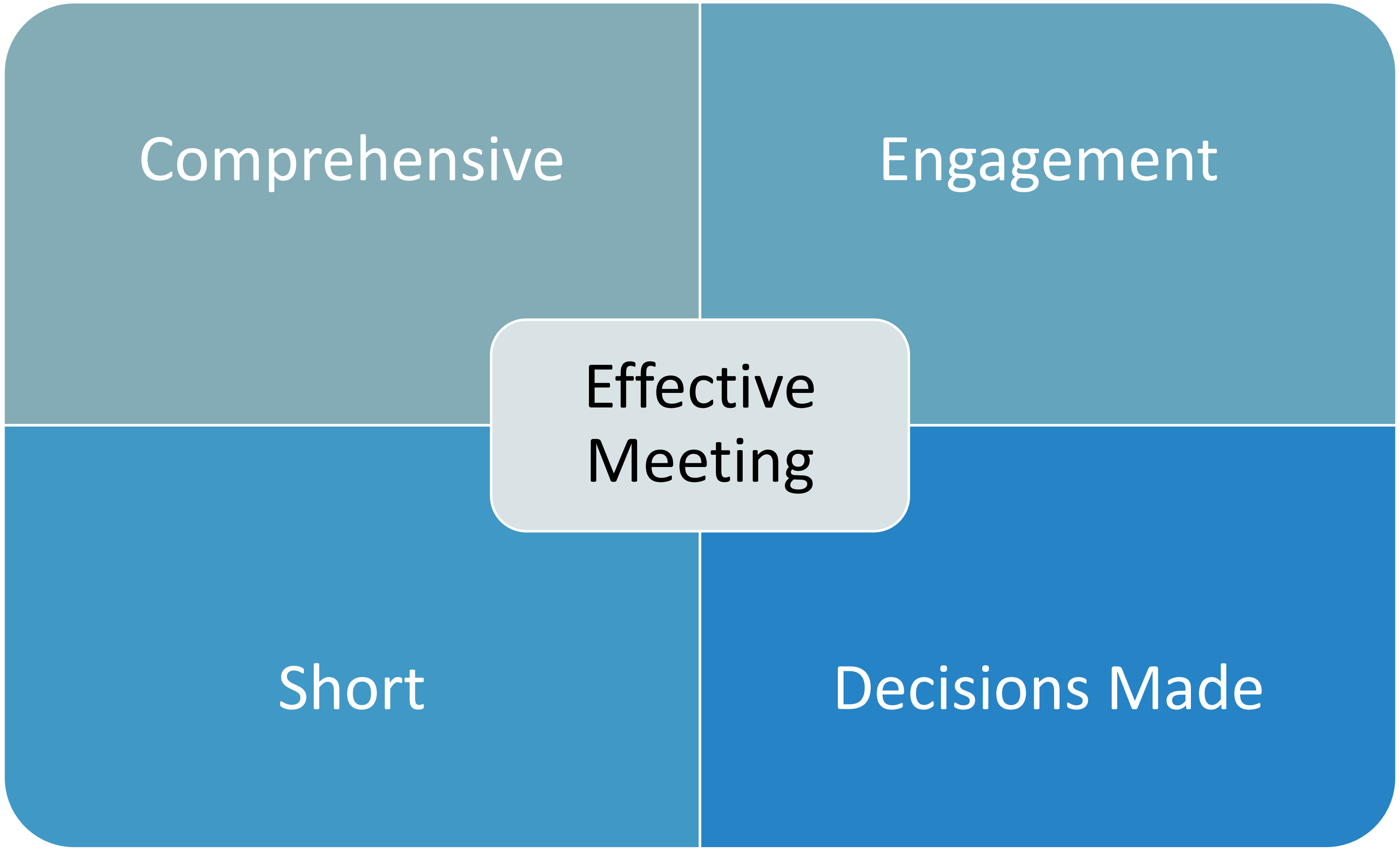


Personal Business Process Reengineering

What Is Required For Effective Meetings And Collaboration?

NOW TO THE HEART OF THE MATTER

What Makes An Effective Online Meeting?



What Makes Virtual Meetings Effective?

Great

- Items accomplished
- Minimal time wasted
- Relationships improved
- Productive discussion
- Prepared, Organized
- Effective follow-up
- Information available
- Minimum distractions

Awful

- Nothing decided
- Waste of time
- Conflict, interpersonal damage
- Rambling
- Random
- Same as last meeting
- Info wrong or unavailable
- All sorts of issues (tech, noise)

Are You Choosing The Right Approach?

Web Meeting

Interactive Collaboration

Effective Meeting

Email and SMS threads

Conference Call

Eight Steps To Conduct An Effective Virtual Meeting

Preparation

1. Nail down the details
2. Send virtual meeting invitations
3. Send virtual meeting reminders
4. Conduct pre-meeting checks

The Meeting Itself

5. Kick off your virtual meeting in style
6. Be the best virtual meeting host ever
7. Don’t just end your virtual meeting—close it
8. Follow up immediately

Costs

Organization

- Service subscriptions
- Hardware infrastructure
- Setup and maintenance
- Security and compliance
- Training

Individual

- Internet service
- Technology setup
- Workspace
- Stipend or self-funded?
- Frustration or expertise

Benefits

Organization

- Recruit from anywhere
- Scalable infrastructure
- Distributed backup
- Performance measurement
- Workflow standardization

Individual

- Work from anywhere
- Ease of connection
- Files needed readily available
- Tools accessible
- Easier to focus on key tasks

Risks

Organization	Individual
• Competition from everywhere	• Easier to replace
• IP leaks	• Can work on other items
• Productivity	• Impact
• Culture	• Isolation
• Starting new initiatives	• Exhaustion
• Mobilizing teams	• Distraction

COMMUNICATION AND COLLABORATION TOOLS

What It Takes To Meet & Collaborate Online

Software

- Web Meetings
- Productivity
- Collaboration
- Portals?
- Project Management
- LOB/CRM/DMS/Workflow

Hardware

- Connectivity
- Computer/Smartphone/VOIP
- Sound
- Camera
- Lights and background
- Scanner

Web Conferencing And Meetings

- Google Chat
- Google Meet
- GoToMeeting
- Microsoft Teams
- WebEx
- Zoho Meeting
- Zoom

UberConference By Dialpad

join me

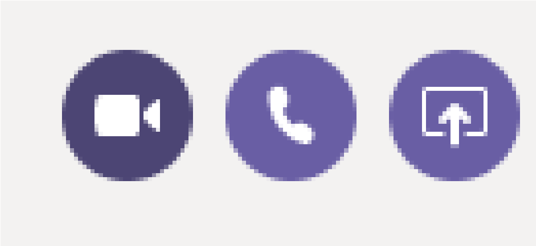
zoom

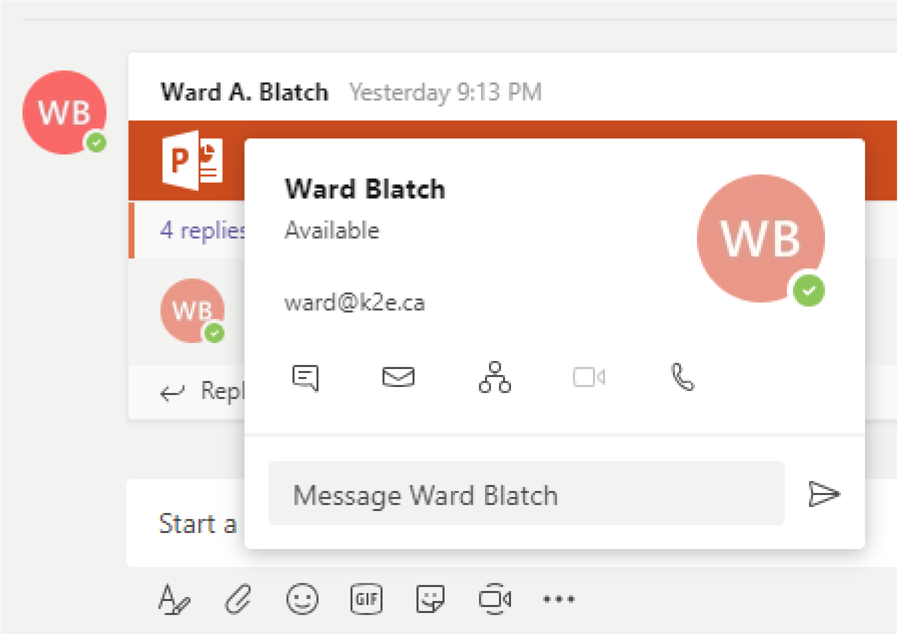
webex by CISCO

GoTo

Teams Web Conferencing

- Audio
- Video
- Whiteboard
- Desktop/App sharing
- Meet with Team or individuals
- Schedule meetings/Calendar
- Chat/Activity





Collaboration Tools

- Chanty
- Flock
- Google Chat
- Microsoft Teams
- Slack
- Zoho Connect
- 25 more alternatives

Project Management

- [Asana]
- [Celoxis]
- [Liquid Planner]
- [Microsoft Project]
- [Monday.com]
- [Smartsheet]
- [TeamWork]
- [Trello]
- [Wrike]
- [Zoho Projects]
- [11 more]

LiquidPlanner

monday.com

smartsheet

teamwork.

Productivity – Email, Document Creation And Editing, Spreadsheets, Presentations

- Microsoft 365 E3 or E5 (formerly Office 365 E5)
  - $36 or $57/user/month
- Zoho One
  - $37 or $90/user/month
- Google Workspace
  - $6, $12 or $18/user/month

Microsoft 365

Google Workspace

ZOHO One

Cloud-Based Suites Provide Great Options

- Cloud-based suites, such as those offered by Google, Microsoft, and Zoho, provide great options and alternatives to the traditional remote access options discussed later
- Users can create, modify, and store documents in the cloud and then access or share them as needed
- Suite apps facilitate collaboration among remote workers by allowing multiple users to edit the same document concurrently

Who Are The Leading Providers?

Microsoft

- Dominant player
- Many different plans to address diverse needs of businesses
- Familiar look and feel of Excel, Word, and other applications

Google

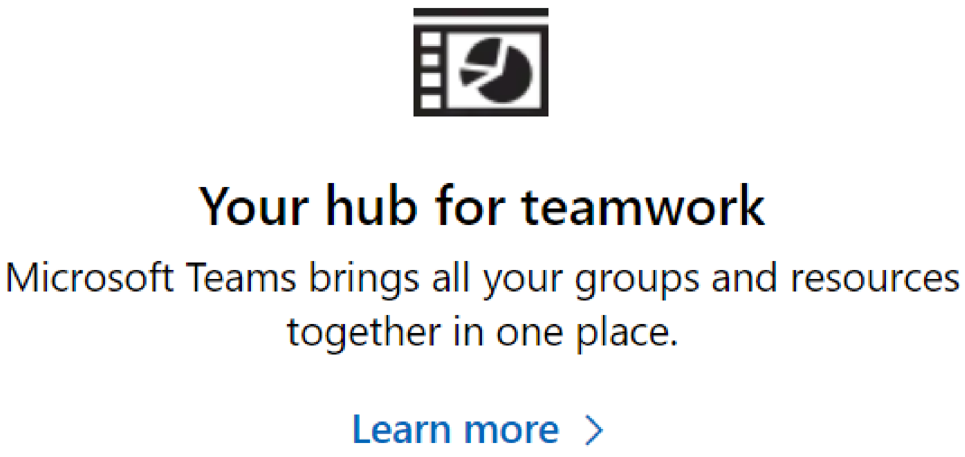
- Cloud-based from the start
- Strong set of apps, including email, word processing, spread-sheets, storage
- Competitively priced

Zoho

- Offers over 60 apps and services in its portfolio
- Email, spreadsheets, word processing, data storage are available
- So are accounting, CRM, marketing tools, remote assist, etc.

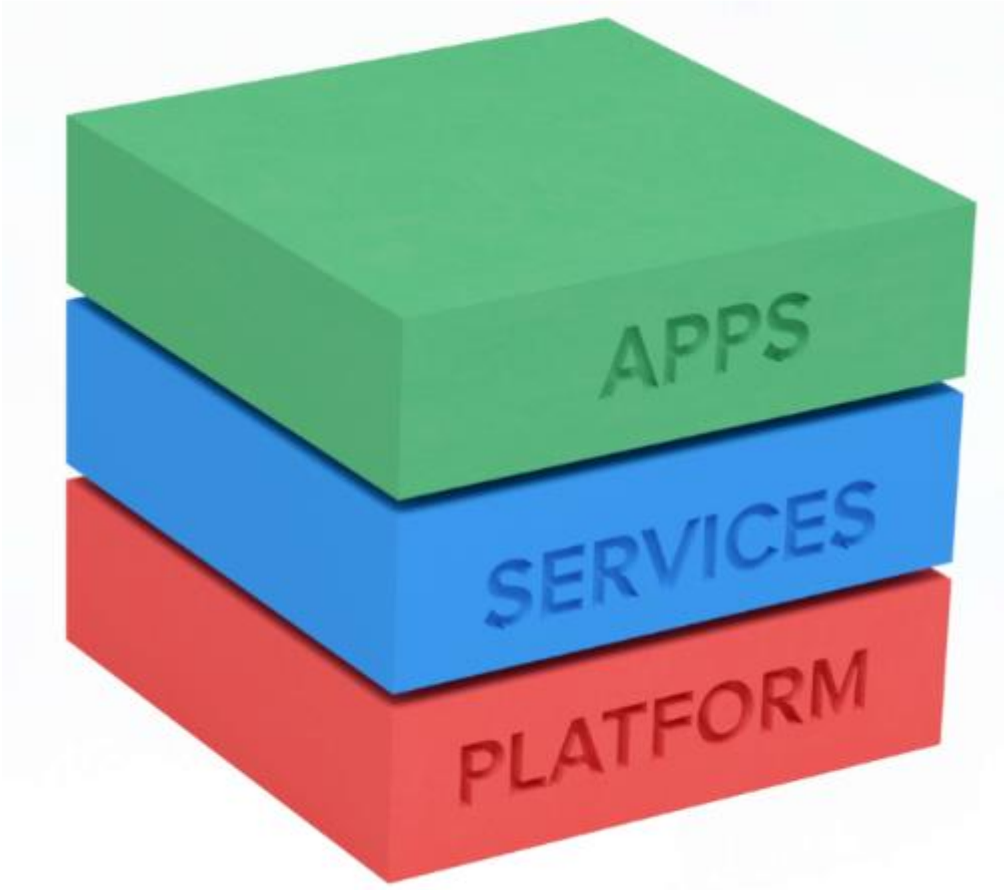
Microsoft 365 Innovations

- Desktop versions of Office applications
- File storage & sharing
- Web versions of Office applications
- Mobile versions of Office applications
- Email & calendaring
- Teamwork & communication
- Security & compliance
- Licensed for commercial use
- Automatic new feature updates
- Support & deployment
- Tools to build & manage your business



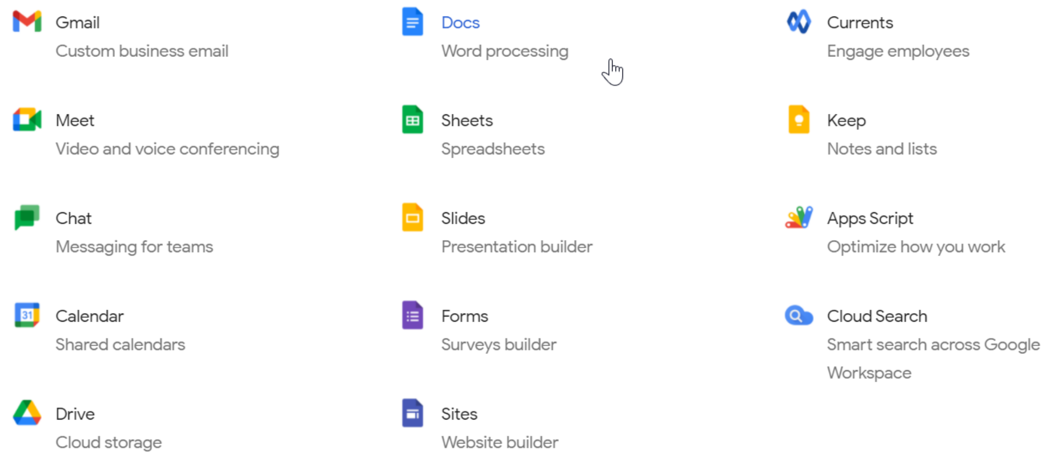
Zoho One

- End to end integrated business management
- 60+ applications
  - Productivity/collaboration
  - Social and email marketing
  - Web site
  - Event management
  - Finance/HR/Analytics
  - Help desk/Customer service
  - Custom app tools

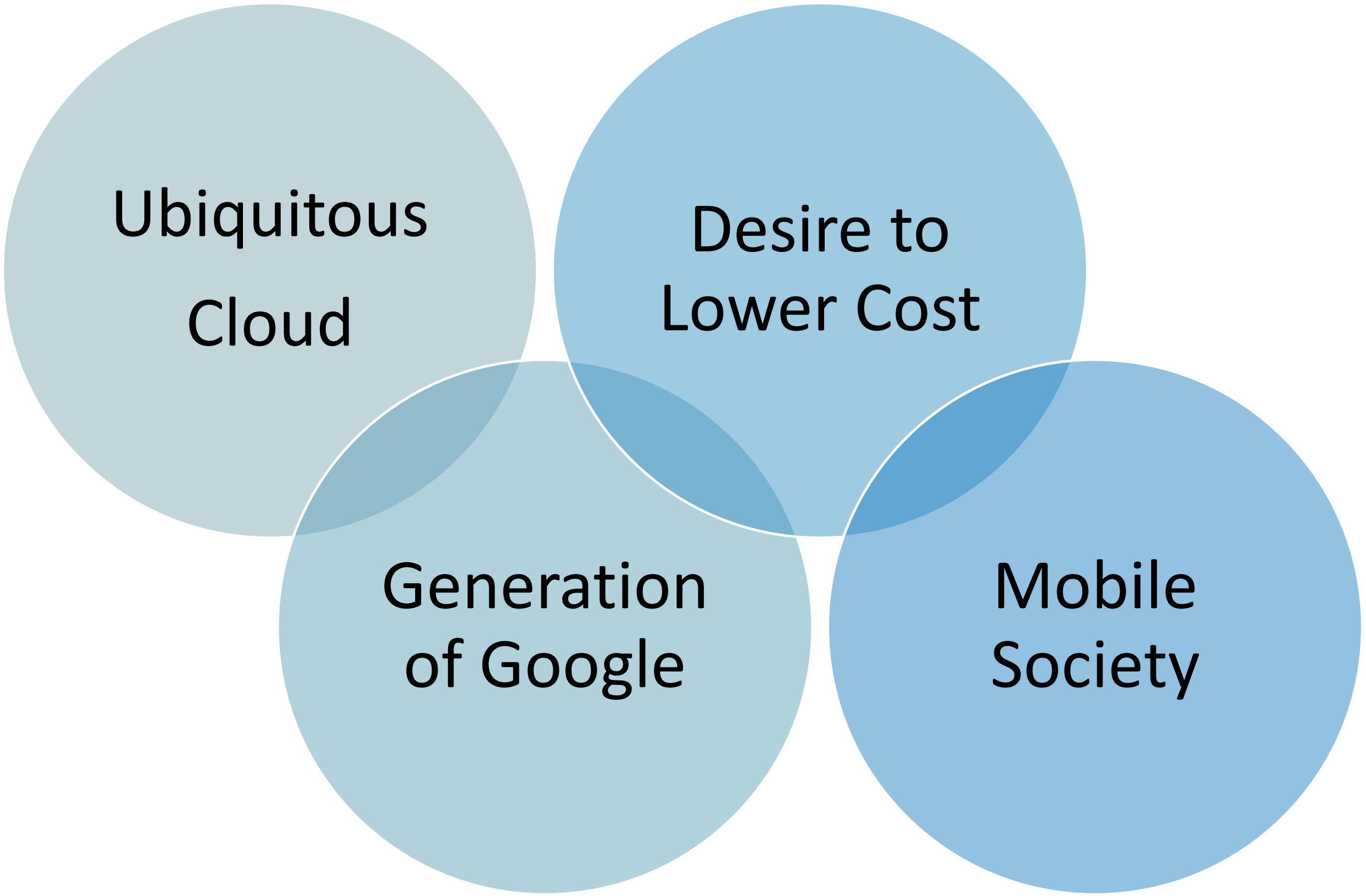


Google Workspace

- Productivity – Gmail, Drive, Docs, Sheets, Slides, Calendar
- Meet, Chat
- Currents, Keep, Vault
- Endpoint
- Project Management tips for Google Workspace



What Is Driving Adoption?



Which Is Best? Microsoft, Google, Or Zoho?

- "*Beauty is in the eye of the beholder*"
- Place your primary focus on:
  - The collective needs of your organization and clients
  - Return on investment
- Don't price line the decision
- Don't focus on the totality of the feature set offered
  - Unless users need advanced functionality

Suite Selection Decision Points

- User interface
- File storage
  - Device access
  - Cost for additional storage
- Compatibility with Microsoft Office
- Sharing and collaboration
- Mobile support

How Do These Apps Help Remote Workers?

- The key is cloud-based data storage (Microsoft OneDrive for Business, Google Drive, and Zoho Docs)
- With data stored in the cloud, users can access it through a web browser without the need to install local apps
- An Excel workbook stored in OneDrive for Business can be opened in Excel on the desktop, Excel Online or Excel Mobile
- Word documents, PowerPoint presentations, and email are accessible through a browser or desktop application
- This reduces the need for remote access to office computers or servers

How Do These Apps Help Remote Workers?

- Documents can be shared with other internal or external users
- This facilitates real-time document collaboration thereby promoting greater productivity
- Compare that to sharing a workbook, document, or presentation via email
- Don't overlook Adobe Acrobat DC when considering cloud-based solutions to remote access
  - DC allows you to store and access PDFs stored in the Adobe cloud

OPERATIONAL TOOLS – LOB/DMS/WORKFLOW

Other Operational Tools

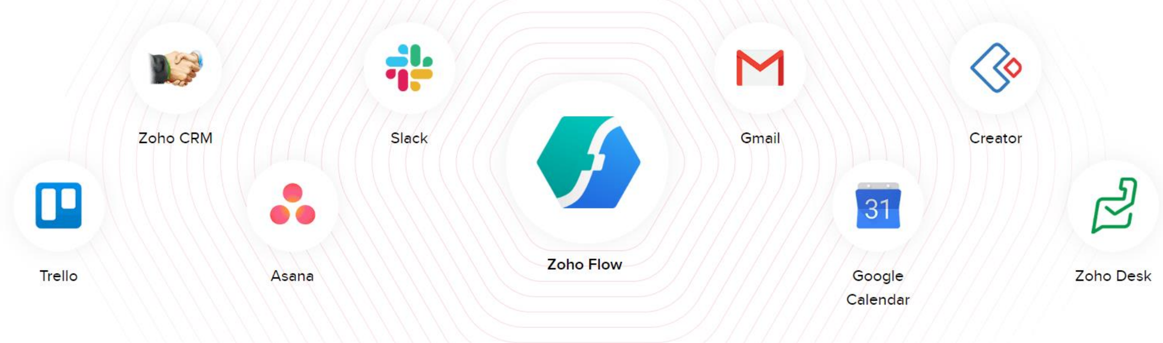
- LOB (Accounting software, Tax, etc.)
- Document management
- Scheduling
- Billing/Invoicing/AP/Expenses
- Workflow…

Microsoft Power Automate

- Capabilities
  - Design logic for your Power Apps
  - Guide your app users through processes
  - Automate across more than 1,000 connected sources
  - Extend your business processes
- Free templates
- Connector Library

Zoho Flow

- Connect your key applications
- Automate extensively with multi-step flows
- Connect information across departments and teammates
- Make it all happen on a dynamic builder
- Off-the-shelf solutions with pre-built flows



CCH Axcess Workflow

XCM | My View | Reports | Scheduler | Search here... | XCM Solutions, LLC K2 E... | Johnston, Randy

My Tasks (8) | My Extensions (2) | My Checklists (0) | Views | Help | Video | User Guide

TASKS ASSIGNED TO ME - 8 *of* 8

\+ ADD TASK

	Client/Entity	Type	Desc	PED	Cat.	Status	Start Date	Due Date	ADD	Last Chg	Pts	Ckl	P	D	Who ... Ext	Who ... Tax Prepar...
1	ABC Bookkeepin...	SP	Compa	12/31/19	OT	Pre Prep Comp R...	05/08/06		09/14/06	02/21/19 02:52:36	0/0	0/0			RJ	0.00
2	A&A CO.	BOOK		12/31/18	BK	To Be Scanned	04/25/13			02/21/19 02:39:58	0/0	0/0			RJ	3.00
3	ABC Real Estate ...	BOOK		12/31/18	BK	Formatting	12/11/13			02/21/19 02:39:47	0/0	0/0			RJ	3.00
4	Snow Company	SLTAX	Retail [	03/31/19	BK	Source Documen...	02/21/19	03/31/19		02/21/19 02:29:15	2/2	0/0			RJ	0.00
5	Fox Corp	1120		09/30/18	TX	Preparation	02/21/19	01/15/19	02/09/19	03/06/19 09:54:12	0/0	6/6	N	3	RJ	5.00
6	Crypto Corporati...	AUDIT		12/31/18	FS	To be scheduled	02/21/19	06/30/19	03/31/19	03/05/19 05:22:33	1/1	15/17			RJ	0.00
7	Jones and Asso...	1065		12/31/18	TX	Preparation	03/05/19	03/15/19	03/08/19	03/05/19 06:21:48	1/1	6/6	N	3	RJ	3.00
8	MacDonald,Eliza...	706		12/31/18	TX	Preparation	03/06/19		03/08/19	03/06/19 11:05:52	1/1	6/6	N	3	RJ	0.00

ProcessMaker – Low Code BPM & Workflow

- Industries
  - Higher Education
  - Banking
  - Insurance
  - Manufacturing
  - Tech & Telecom
  - Government
  - Healthcare
- $1,495/month

Remote Access Tools

- GoTo – approximately $35/user/month
- LogMeIn Pro – $70/five users/month
- Team Viewer – $49/user/month
- Windows Remote Desktop
- Zoho Assist – $8-21/user/month
- Thirteen more

Why Didn’t I Think Of That?

DOCUMENT EXPERIENCE

Manage Documents Effectively

- Gathering, Exchange, Distribution

How do you get what you need?	How do you keep track of it all?
• Prepared by Client (PBC) list? • Portal? • Organizer? • Monthly checklist for bookkeeping services? • Email? • Calls (sometimes as a desperate last resort)?	• Document Management System (DMS), document storage system (DSS), DIY • Workflow • Spreadsheets • Task lists in practice management

What Do You Want The Document Exchange Process To Be?

Client Experience

- Provide the firm what they have
- In the format they have
- Firm requests are easy to do
- Legal eSignature easy to do
  - Sign off on new projects
  - Complete requirement paperwork
- One place to track everything

Team Member Experience

- Have everything they need
- In the format they need
- Easy to make and track requests
- Quick handling of
  - Engagements
  - 8879s
- One place to gather/receive

- Effective Client And Team Use Of Documents

Right content, right format, right time

Complete, correct, concise

With these attributes

- Easy to read
- Easy to find
- Easy to collaborate
- Easy to distribute
- Retained by engagement or policy

What Should The Document Experience Be?

Client Experience

- Clear information
- Retrieval simple
- Any device and format
- Convenient
- Questions and answers
- Easy? = not frustrated

Team Member Experience

- Complete information
- Location specific item simply
- All needed to project completion
- Fits firm workflow
- Resources to respond
- Effective? = not frustrated

SECURITY CONSIDERATIONS

How Do We Keep Digital Documents Secure In This New, Interactive, Collaborative World?

Users will be

- Browser-based
- Mobile
- Frequently not have sophisticated IT skills or support

Tools must be

- Secure
- Have native Multi-factor Authentication (MFA)
- Single Sign On, OAuth, or passwordless
- Connected
- Encrypted

To Manage Risk When Exchanging Sensitive Client Information

Select The Right Tools

How Do We Manage Risk?

- Select and use fewer tools
- Verify security of all tools used
- Enforce MFA
- Have control procedures on critical tasks and deadlines
- Encrypt in transit and at rest
- Tools should do multiple tasks
- Look for SOC reports
- Turn on MFA everywhere
- Control your practice with Practice Mgmt. / Workflow
- Never communicate insecurely

What Are The Right Tools To Manage Risk?

- Security tools like MFA and Single Sign On
- Document gathering tools like Liscio, Hubdoc, Dext
- Reporting tools like Reach Reporting, Fathom, Spotlight, & Jirav
- Control tools like Karbon, Aero Workflow
- Cashflow tools like LivePlan
- Encrypted storage tools like SmartVault

Creating Firm Experience 2.0

- First, carefully choose services
- Select the right tools
- Improve workflow management?
  - Define project types
  - Define workflow steps for each project type
  - Define other project information to track
  - Accumulate data on projects in progress
  - Assign staff to projects (delegate, delegate, delegate)
  - Plan capacity to meet client demand
  - Manage project results as a CEO

The Key Is Better Workflow Management

Client-Centric = People Experience

For Clients

- Services they want and need
- In addition to must-have
- Relationship, not transactions
- Value, not commodity
- Overused, but trusted advisor

For You AND Your Firm

- Challenging and expansive
- Ability to charge more
- Team approach
- Higher rates and MRR
- Involved in a good way

People Experience = Firm Experience 2.0

For Your Team

- Getting to a single source of truth for client data
  - Manage documents
  - Client communication
  - Coordinate projects & engagements
- Improving team member productivity and experience
  - Mitigate employee burnout, resignations
  - Improve realization
- Right offerings to the right clients = services clients want & need

For Your Clients

- Helping clients personally and with their business needs
  - Margin/space/comfort
  - Planning
  - Focus
- Improving client collaboration means many things
  - Improving PBC, delivery
  - Seamless workflow with eSignature
- Making money for all involved while using resources wisely

PARTING THOUGHTS

Why Didn't I Think Of That?

Some Final Tips And Tools

People

- Start conversations personally
- Turn cameras on
- Show hands
- Summarize with action steps

Software

- Booking software – Calendly
- Time Tracking – Clockify.me
- Workflow – n8n.io
- Social Media – Agorapulse
- Meeting agendas – Yabbu
- Transcribe video – Otter.ai

Summary

- Online meeting tools can be part of your productivity suite
- You need to be thoughtful about how and when to meet online and when collaboration would be sufficient
- Enabling online meeting and collaboration is a combination of strategy, software, and hardware to create the best experience

BEST OF LUCK!