

WEBINAR ON HOW TO
**MANAGE YOUR WORK
FROM HOME USING
RIGHT TECHNOLOGY?**



SPEAKER
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About the Speaker



Sanjib Sanghi

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- Fellow Chartered Accountant with 20+ experience in Domestic & International FinTech industry
- Co-opted Member of Digital Accounting & Assurance Board, ICAI, New Delhi (2020-21)
- Past Secretary, Eastern India Regional Council of the Institute of Chartered Accountants of India
- Chairman, Information Technology Committee of Merchant Chamber of Commerce
- Founder, Digital Accountants & Author, “The Digital Professional” – Using Technology to Simplify Work
- Career counsellor – mentored thousands of students in 100+ schools and colleges in Kolkata
- Passionate trainer on Excel, QuickBooks Online & Digital Transformation



Current Scenario of roads due to Coronavirus Locked Down
No one knows how many more days will it continue



Business Continuity Solution - WFH

The Novel Coronavirus has created a worldwide lockdown and is impacting personal and work lives

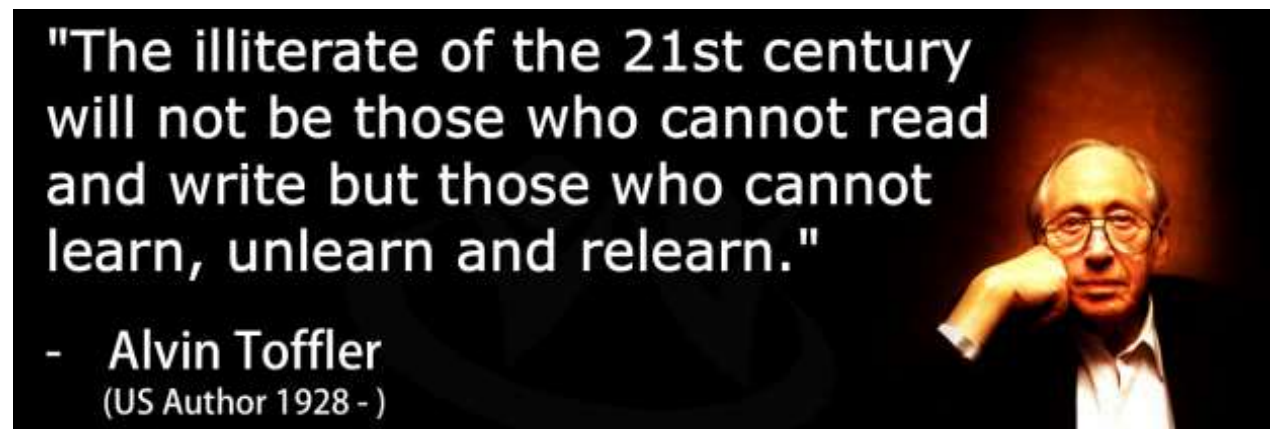
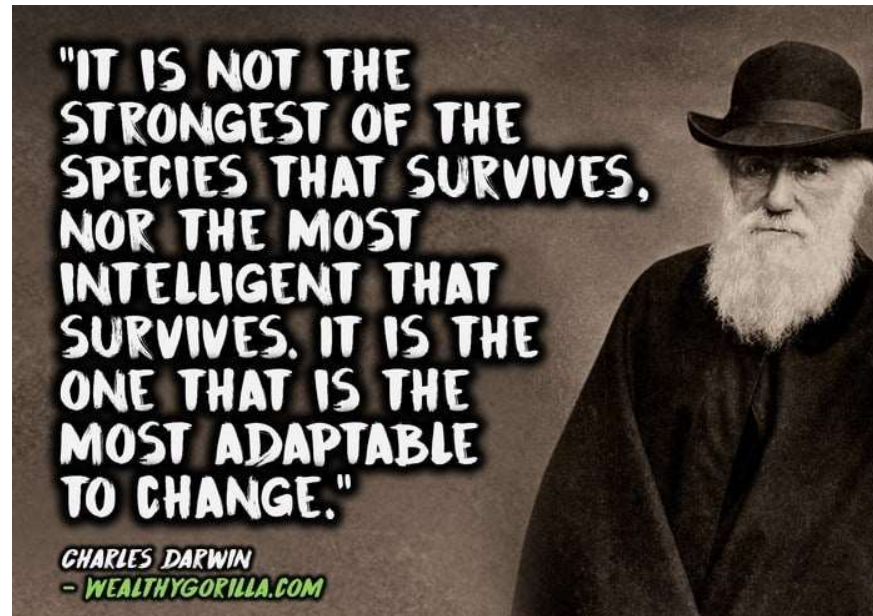


It is better to restraint yourself at home for social distancing and

“Work From Home”

to continue serving your clients

Popular Quotes



Work From Home is the Future



Every challenge is entailed with New Opportunities

This challenge is getting us *'Future Ready'*



Challenges in Work from Home

- Working Mindset
- Finding a silent zone at home to concentrate at Work
- One-Stop Solution to Work From Home
- How to Collaborate with Team & Clients?
- How to Share Files and Folders?
- How to Manage Work anytime from anywhere?
- How to measure Productivity?
- How to do Accounting on Cloud?
- How to secure Data and Password?



What's Your Digital Quotient?

- Is your social media presence good enough to attract future Clients or Employees?

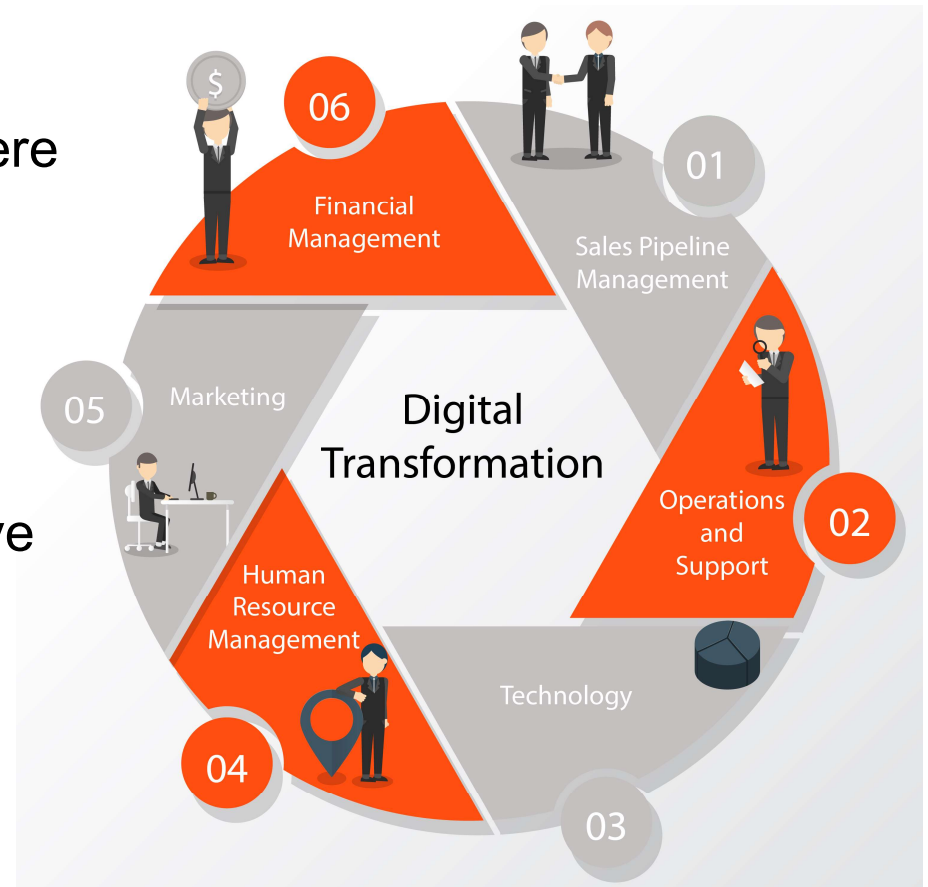
How do you manage your data – manually or on the cloud?

- Can you access your financial information anytime, anywhere?
- How do you maintain your schedules, to-do's?
- Do you use online/ mobile banking?
- How do you manage your contacts?
- Do you have dashboard for your client status ready?



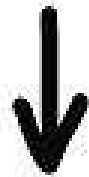
Road Map to be Digital

- Go Paperless
- Manage Work Anytime from Anywhere
- Manage Employee Motivation
- Client Engagement & Experience
- Training & Increasing Learning Curve
- Digital Reputation
- Client Reporting
- Data Network & Cyber Security



Solutions for Work From Home

NEW MINDSET



NEW RESULTS

Work from Home and not Work for Home

Concept of Cloud Computing



Communication Tools

For Virtual Meetings:



Skype (Live Demo)



Zoom



Go To Meeting

Communication Tools

For In-house Staff Communication:



Microsoft Teams

Remote Access Tools



Any Desk (Live Demo)



Team Viewer

File Sharing Tools



- Online File Repository
- Act a Backup
- Storehouse of Large Files
- Access anytime, anywhere



Google Drive (Live Demo)



Dropbox



We Transfer



One Drive

Sample Folder Structure

Client

This PC > Citrix Files (S:) > Shared Folders > Wealth Depot > Clients A-E				
Name	Date modified	Type	Size	
A and A Lawn Care	4/6/2020 9:07 PM	File folder		
A and C Pest Management	4/6/2020 8:06 PM	File folder		
A Second Opinion LLC	3/6/2020 10:31 PM	File folder		
A-1 Termite and Pest Control	4/7/2020 1:26 PM	File folder		
A-Action Pest Control	4/6/2020 7:37 PM	File folder		
Aberlour At Newton LLC	12/23/2019 7:24 PM	File folder		
Able Pest Exterminators	4/4/2020 9:39 AM	File folder		
Absolute Pest Control	2/24/2020 11:47 AM	File folder		
Absolute Pest Control Inc - NY	3/28/2020 5:49 PM	File folder		
Accurate Termite and Pest Solutions	4/8/2020 9:53 AM	File folder		
Activ Kontrol (Truly Nolen)	4/8/2020 10:23 AM	File folder		
Adams Pest Control Anne-Marie (FL)	4/7/2020 9:55 AM	File folder		
Admiral Pest Control	3/28/2020 12:16 PM	File folder		
Advantage Pro Services Inc	4/7/2020 6:34 PM	File folder		
Aggieland Green Ltd	4/7/2020 3:02 PM	File folder		
Agurto Corp	4/3/2020 2:09 PM	File folder		
Alamo Pest Management	4/1/2020 12:43 PM	File folder		
Alcar Tennis Court Construction	1/11/2020 9:25 AM	File folder		
All American Pest Control Inc	4/8/2020 9:53 AM	File folder		
All Natural Pest Elimination	3/28/2020 4:49 PM	File folder		
All Turf Inc	4/7/2020 9:05 PM	File folder		
Aloha Termite Kauai Inc	4/8/2020 11:24 AM	File folder		
Alpha enterprise	3/17/2020 9:08 AM	File folder		

Year

This PC > Citrix Files (S:) > Shared Folders > Wealth Depot > Clients A-E > Able Pest Exterminators				
Name	Date modified	Type	Size	
2016	10/19/2018 8:42 PM	File folder		
2017	10/19/2018 8:42 PM	File folder		
2018	1/28/2020 11:15 AM	File folder		
2019	3/20/2020 9:00 AM	File folder		
2020	4/4/2020 9:40 AM	File folder		
Client Distribution	3/28/2020 9:44 AM	File folder		
Permanent File	11/19/2019 8:55 AM	File folder		
Tax Return	12/18/2018 3:24 PM	File folder		

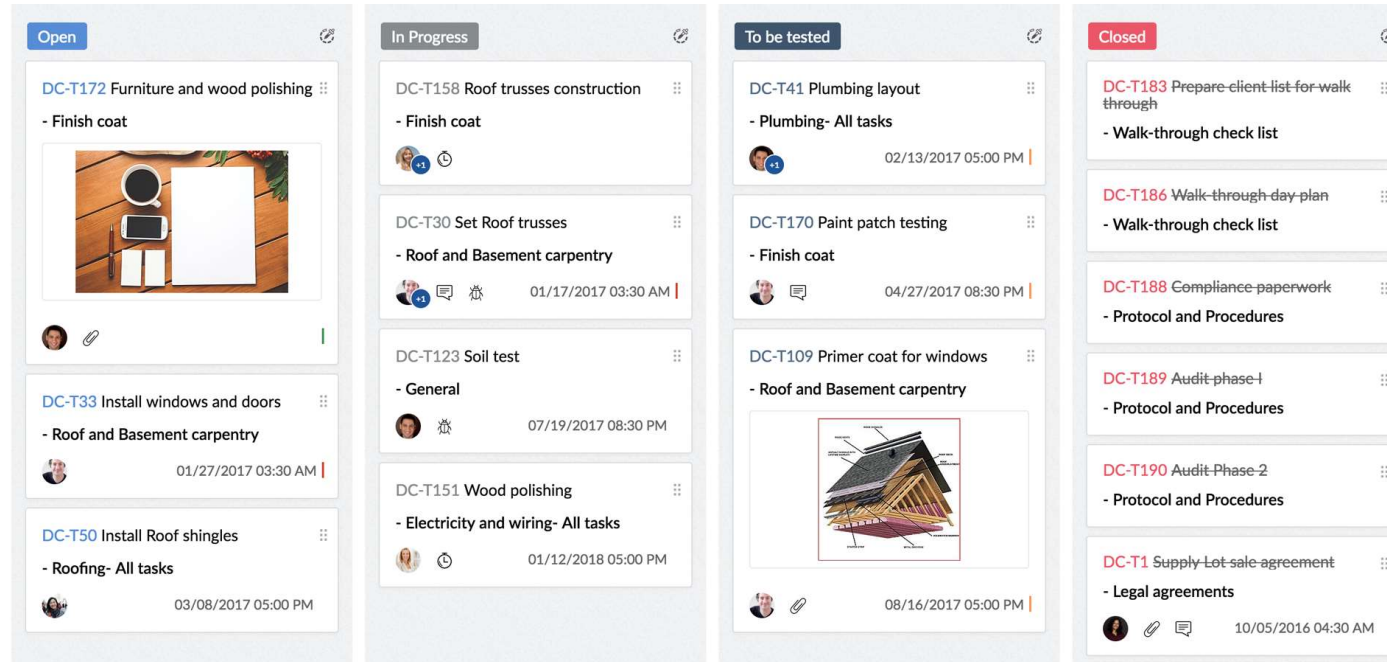
Month

This PC > Citrix Files (S:) > Shared Folders > Wealth Depot > Clients A-E > Able Pest Exterminators > 2020				
Name	Date modified	Type	Size	
Apr	4/4/2020 9:40 AM	File folder		
Aug	12/23/2019 7:08 PM	File folder		
Dec	12/23/2019 7:09 PM	File folder		
Feb	3/12/2020 8:54 AM	File folder		
Jan	2/15/2020 5:26 PM	File folder		
July	12/23/2019 7:12 PM	File folder		
June	12/23/2019 7:13 PM	File folder		
Mar	4/3/2020 6:59 PM	File folder		
May	12/23/2019 7:14 PM	File folder		
Nov	12/23/2019 7:15 PM	File folder		
Oct	12/23/2019 7:16 PM	File folder		
Sept	12/23/2019 7:17 PM	File folder		

Services

This PC > Citrix Files (S:) > Shared Folders > Wealth Depot > Clients A-E > Able Pest Exterminators > 2020 > Mar				
Name	Date modified	Type	Size	
BRS	3/28/2020 1:51 PM	File folder		
CC	3/28/2020 1:51 PM	File folder		
Payroll	3/21/2020 9:03 AM	File folder		
Reports	4/8/2020 12:34 PM	File folder		

Project Management Tools



Zoho Projects



Trello



Clickup



CCHiFirm

Time Management Tools



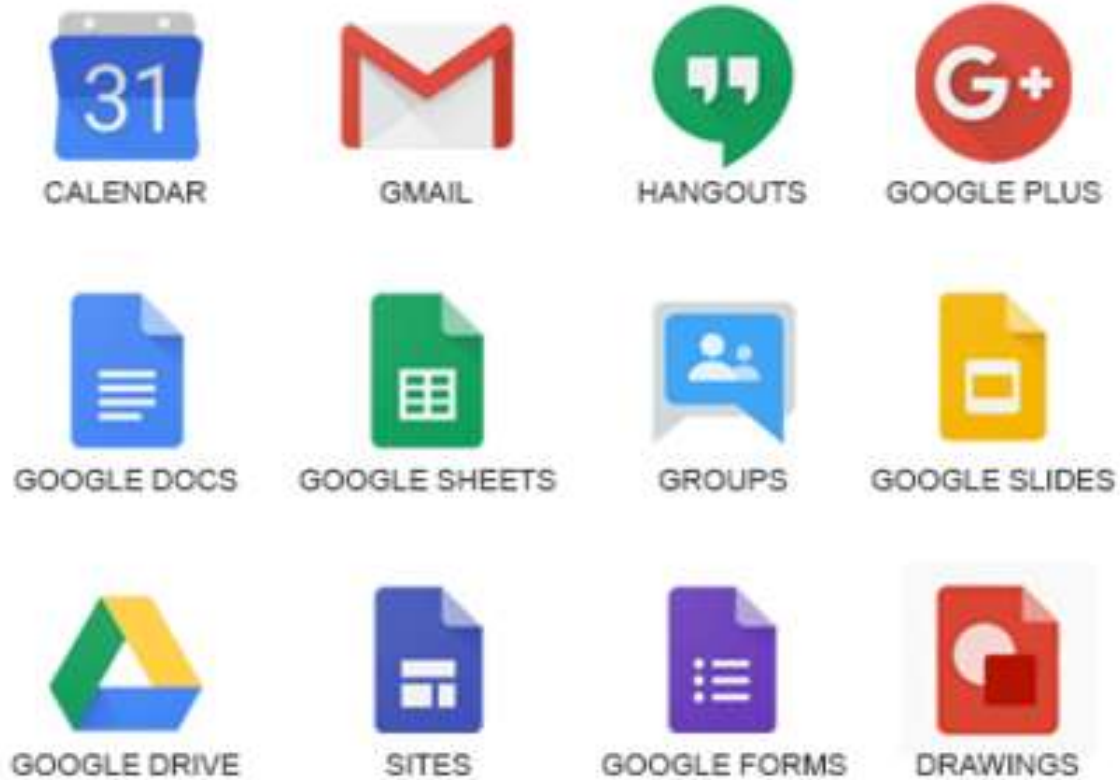
Clockify (Live Demo)



Evernote



One Stop Solution for all Work From Home Needs



G-Suite



Office365 tools



One Stop Solution for all Work From Home



Your Office Is Where You Are

 Admin Panel

Communicate remotely

In addition to text, use audio/video conferencing to have effective remote conversations.



Cliq

Text, audio, and video conferencing



ShowTime

Online training



Meeting

Web-conferencing and webinar

Collaborate remotely

Organize your remote teams and align them to project goals and deadlines.



WorkDrive

File sharing and management for teams



Projects

Project management



Sprints

Agile project management

Assist remotely

Reach out remotely to assist customers or field technicians.



Assist

Remote-access support



Lens

AR-assisted remote support

Be productive remotely

Co-create content by contacting your colleagues within app for review.



Writer

Collaborative word processing



Sheet

Smart spreadsheets



Show


Collaborative presentation creation

It is free till 1st July, 2020

Cliq



Zoho Meeting

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Meeting

Start an instant meeting, invite participants, and interact via screen sharing, audio, and video conferencing.

[Meet Now!](#)

Webinar

Organize a webinar, allow people to register, and present using screen sharing, audio, and webcam sharing.

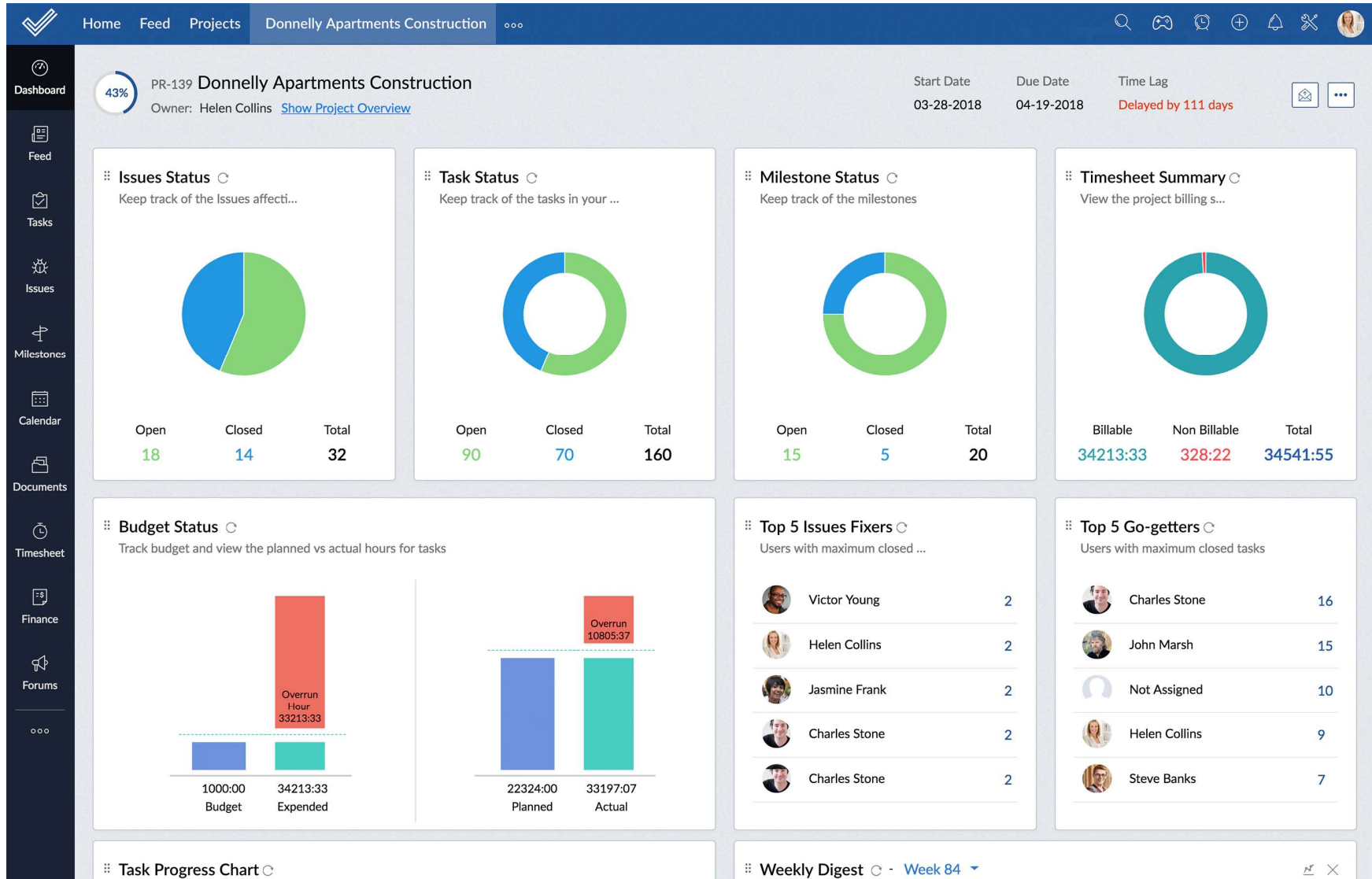
[Schedule a Webinar](#)

Want to schedule an online meeting in advance?

[Schedule a Meeting](#)

(Live Demo)

Projects



Zoho Assist

Invite your customer for an attended remote support session.

malcolm.h@zylker.com

START NOW

SCHEDULE

Upcoming			History	Favorites
Title	Customer	Date & Time		
Remote Support <i>by you</i>	malcolm.h@zylker.com	July 25, 2017 12.30 PM		
mac crashed <i>by You</i>	malcolm.h@zylker.com	Jul 28, 2017 10:30 PM		

(Live Demo)

CLOUD ACCOUNTING

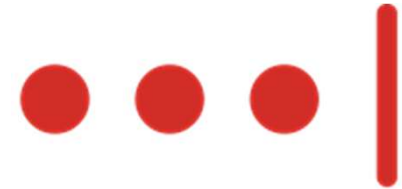
As the Business Is On Don't Miss out your Transactions relying on Desktop Based Accounting

It's Time to Switch to Cloud Accounting!!



Tools for Data Security

Password Management



Last Pass



One Pass



Keeper

Other Security Measures

- Lock Devices from Unauthorized Access – PCs, Laptops, Mobiles, Tablets etc.
- Run your Antivirus & Malware Software
- Back-up Important Data
- Install Operating System Updates
- Do not open unknown e-mails
- Log out the Internet Connection after use (else it may be prone to attacks)
- Do not save passwords on your devices (access through password managers)



Norton



Kaspersky



Quick Heal

Other Security Measures

- Hackers target persons rather than devices
- Phishing emails often come up with a sense of urgency
- Avoid using default passwords. Give access to people who you want but use strong passwords
- Regularly update your software because cyber attackers constantly look for vulnerabilities in your system
- Make sure your kids and guest do not touch your work system otherwise it may cause a loss of data

How can you utilise this Lockdown Period Efficiently?

- E-learning via various platforms
- Take group initiatives and divide the tasks.
- Organize all the scattered data.
- informal conversations over phone with clients
- Plan new oppoortunities to advise your clients that can serve them better
- Digitalization of your CA firm. It's the best time to start!



Few Things which you can learn while you are at Home?



Advanced Excel with basic Macros, Power Query & Power Pivot



How does a Bot work



Learn about Artificial Intelligence and Block Chain



Learn Cloud Accounting

Implement a Work Routine

- Start your day early
- Plan your day
- Speak with your team regularly and take updates
- Follow up with your clients, employees and review work
- Take adequate breaks
- Use technology to full extent
- Read and Upskill



Work-Life Balance



***Get yourself Future Ready while you are working from Home. As
Work from Home is the Future.***