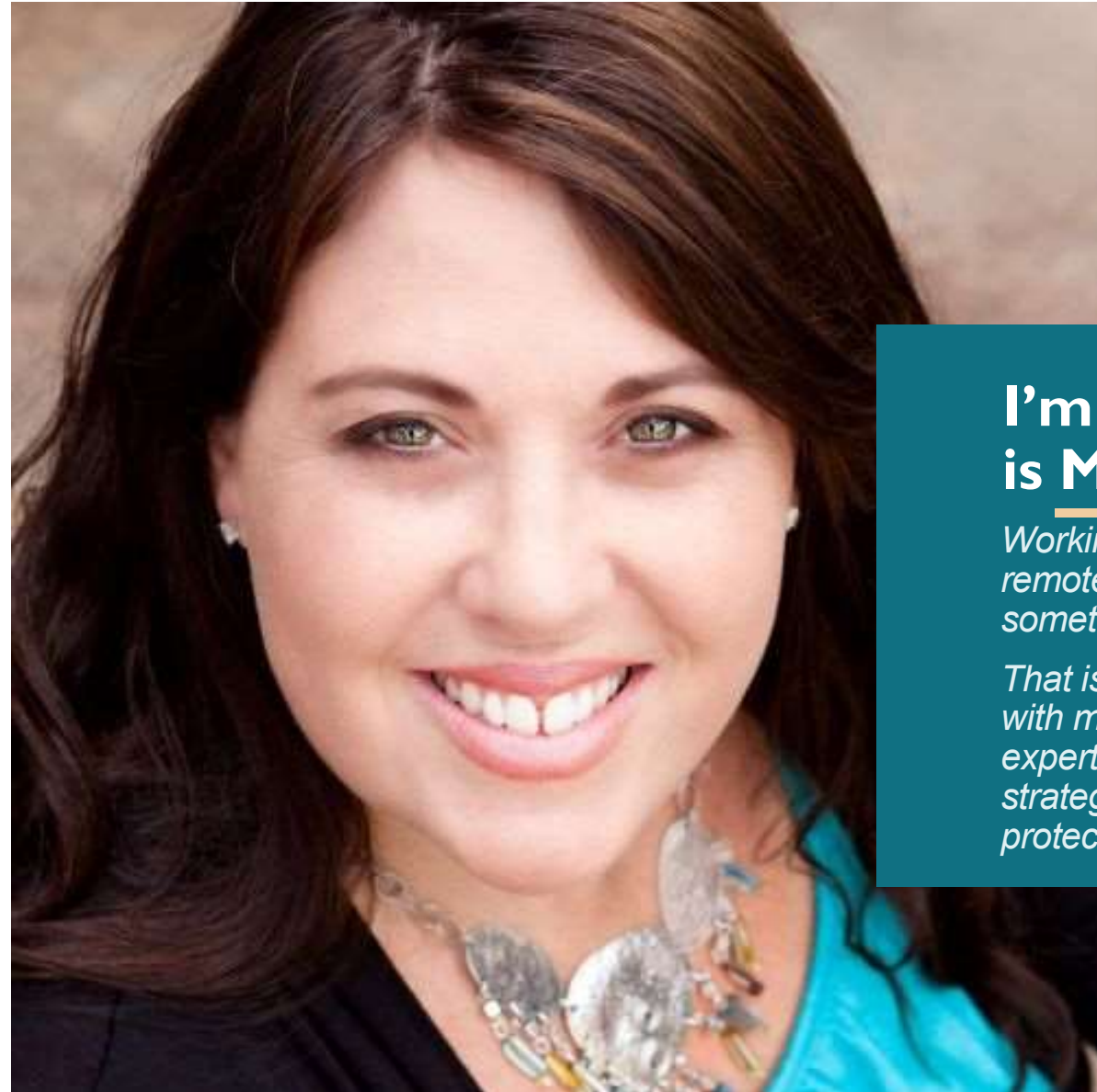




**Prep your business and your
employees to work remotely.**

*With Dawn Klevesahl
Certified Professional
Bookkeeper working
from home since 2009*



I'm Dawn Klevesahl and this is MY BIG IDEA

Working from home or moving your employees to remote work can seem overwhelming when it is something you have never done before.

That is where I come in. I have been working remotely with my clients for over 10 years and have the expertise and tools to help you plan your remote strategy, enhance client and team communication, and protect your team ~ all at the same time!

Your remote work plan

Step 1

*Communication
Tools*

Step 2

*Online meetings
for your team and
clients*

Step 3

*Access to critical
data*

Step 4

Online Scheduling

Step 5

*Put Procedures in
Writing*

SUCCESS

Step One – Communication Tools

✓ Slack for your office and clients

Slack is an online platform that allows you to keep conversations organized, stay in the loop so that everyone on your team has access to the most up-to-date information.

Use it for team communication AND client communication by creating different channels that are visible only to those who need it.

www.Slack.com

✓ Workstreams for your office and clients

Workstreams is an online project management tool that works with Slack. Tasks and updates to tasks created in Workstreams are updated in Slack so that your team and your clients are updated on project progress in real time.

app.workstreams.ai

Step Two – Online Meetings for your team and clients



Whereby - up to 50 participants with the paid plan

This online conference room is great for secure face-to-face online meetings. The free version gives you one room with a custom and unique URL, up to 4 participants, desktop and mobile, screen sharing, and room locking. Paid versions available starting at \$9.99/month with features like recorded meetings and branded rooms.

[Whereby.com](https://whereby.com)



Zoom – 1000 participants with the paid plan

If you have a larger team this online meeting software might be the best choice for you. Host up to 100 participants with the free plan, unlimited 1 to 1 meetings, 40 minute limits on group meetings, and unlimited meeting numbers included with the free plan.

[Zoom.us](https://zoom.us)

Step Three – Access to critical data



Hubdoc - Free Trial

This app gives you bank-level security to automatically retrieve bank statements and recurring bills. Syncs with Xero and QuickBooks Online.

Snap pictures of your receipts and they will automatically appear in the app.

[Hubdoc.com/pricing](https://hubdoc.com/pricing)



Sharefile

This is a file sharing hub that allows you to securely share files with your clients and staff. I use this as a client portal to give my clients a simple but secure way to send me files and passwords.

[Sharefile.com](https://sharefile.com)



GoToMyPc

1 user, unlimited remote access, file transfer and sync, remote printing

[Get.gotomypc.com/plansandpricing](https://get.gotomypc.com/plansandpricing)

Step Four – Online Scheduling

✓ **Appointlet – free to \$8/month**

Unlimited bookings, unlimited meeting types, unlimited form fields

Integrates with Google Calendar

Appointlet.com

✓ **Acuity Scheduling – free to \$50/month**

Client self scheduling, offer unlimited services and appointments

Customizable with paid plans, including integration with other calendars

Acuityscheduling.com

✓ **Google Calendar**

Online calendar that helps you link all of your calendars together. I find it useful to block off times on this calendar rather than try to use the scheduling software to block off the times.

[Available in app stores and on the google homepage](#)

Step Five – Put procedures in writing

✓ Create or update employee job descriptions

Clarity is going to be so important when making this change. Be very clear with your employees. Create or update the employee job descriptions so that they know exactly what you are expecting from them.

✓ Update engagement letters for clients

Your clients will be comforted by an engagement letter that clearly outlines your expectations. This includes the dates of the arrangement, when payments will be due, the time-frame they should expect work and response times, the scope of the work you will provide, and what you expect from them.

✓ Write down and distribute procedures for your employees

Along with their new job responsibilities, your employees will need clear guidelines for how they will work with your customers, and how you will be communicating with them in this new dynamic.

The more information you can provide them with the better. This includes copies of the engagement letter for the client's they will be serving.

YOUR REMOTE WORK PLAN



- ✓ **STEP ONE**
Office Communication Tools
Slack Workstreams
- ✓ **STEP TWO**
Online Meetings
Whereby, Zoom
- ✓ **STEP THREE**
Access to client data
Hubdoc, Sharefile, GoToMyPC
- ✓ **STEP FOUR**
Online Scheduling
Appointlet, Acuity Scheduling,
Google Calendar
- ✓ **STEP FIVE**
Procedural Guide
Job Descriptions, engagement
letters, share procedures

Let's connect

-  **Dawn Klevesahl**
-  **Dawn@StressFreeTaxSeason.com**
-  **Schedule a discovery call**
<http://bit.ly/callDawn>
-  **On Facebook**
<http://bit.ly/joinDawnsGroup>



**Day one = Profitable
for your online business**