

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**



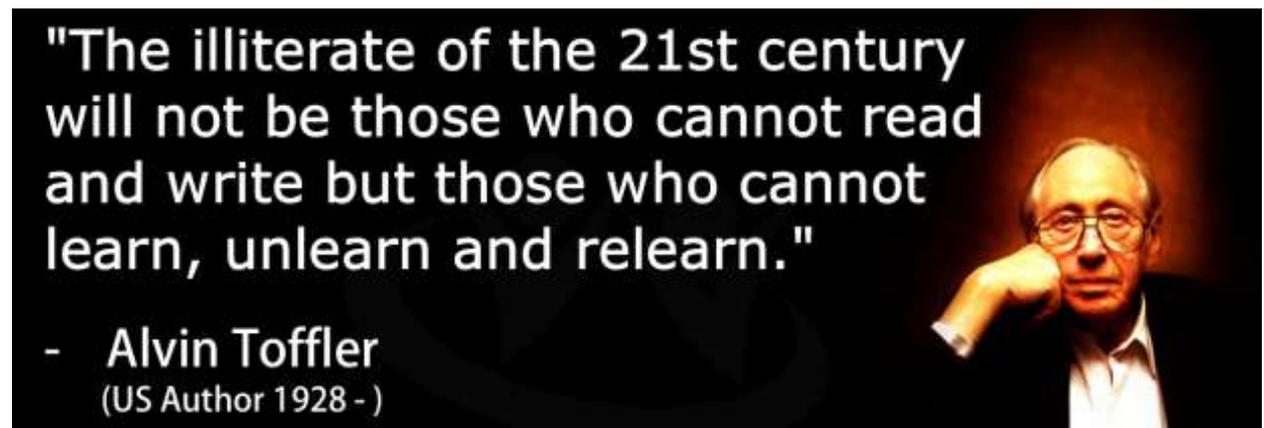
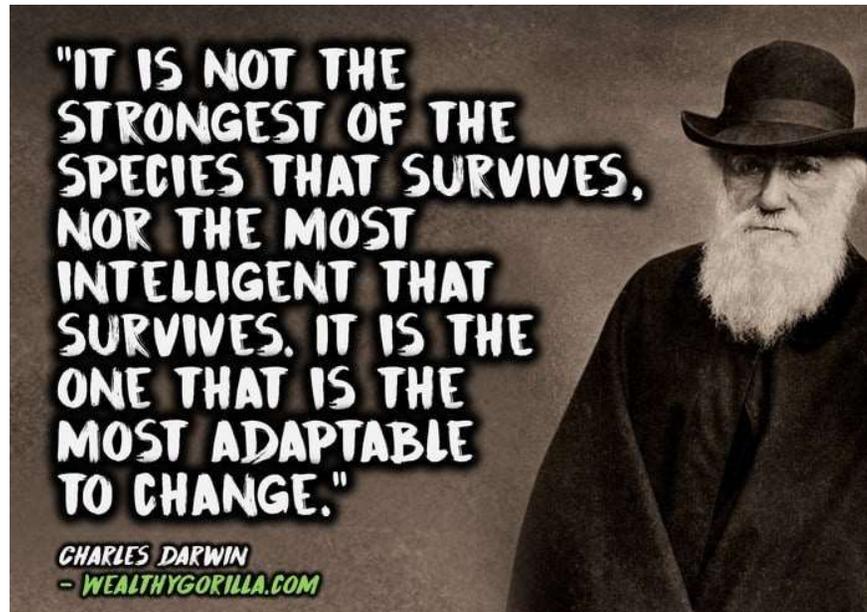
Business Continuity Solution - WFH

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?

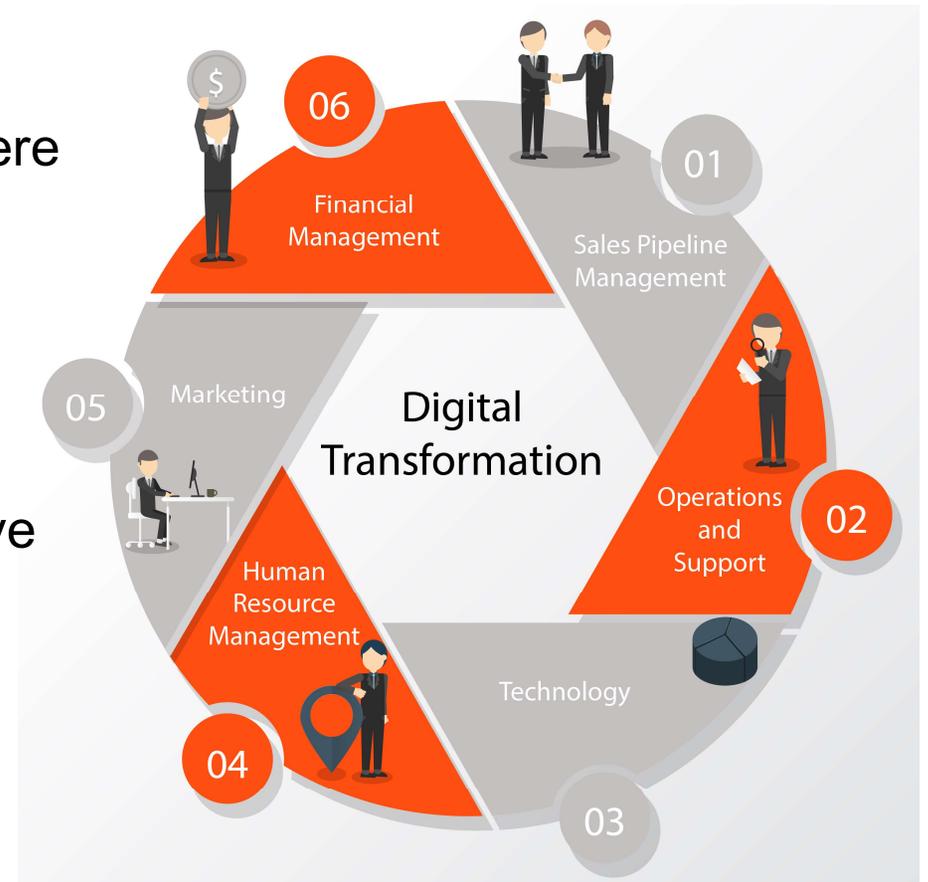
How do you manage your data – manually or on the cloud?

- 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

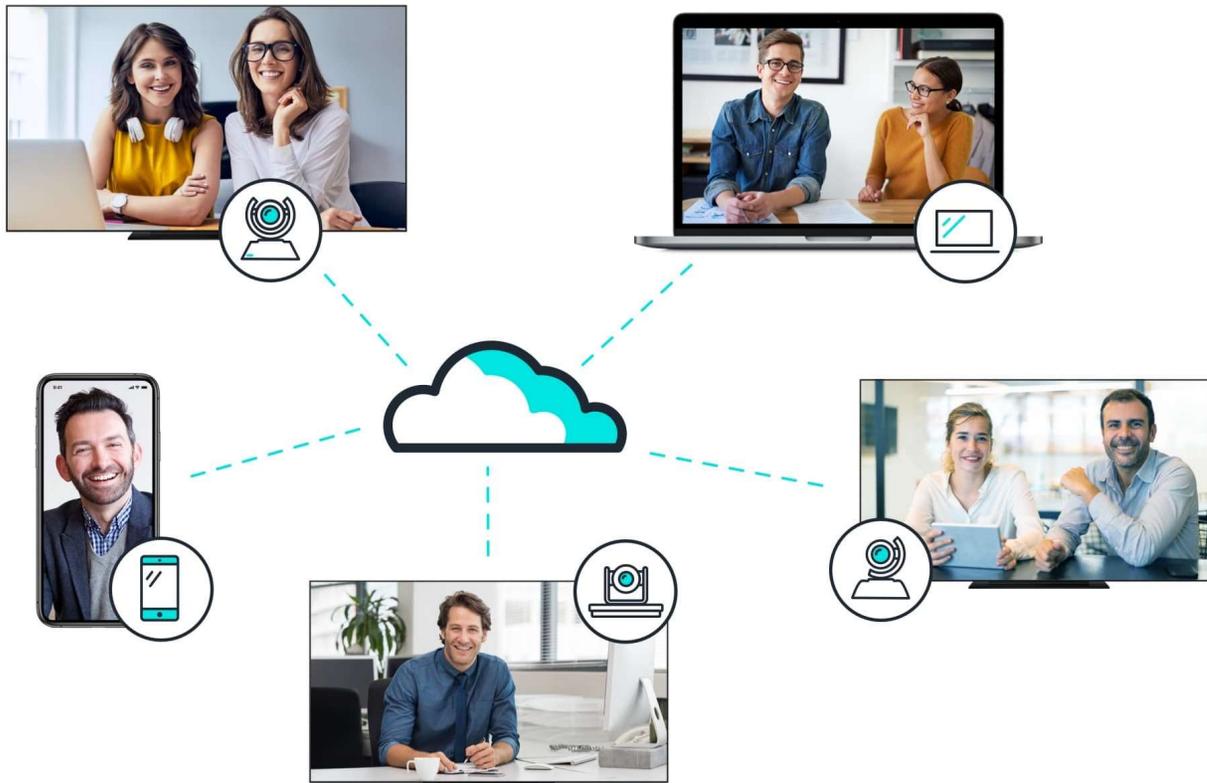
Work from Home and not Work for Home

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

The screenshot displays a project management tool interface with four columns: Open, In Progress, To be tested, and Closed. Each column contains task cards with titles, descriptions, and dates.

- Open:**
 - DC-T172 Furniture and wood polishing ::
- Finish coat
01/27/2017 03:30 AM
 - DC-T33 Install windows and doors ::
- Roof and Basement carpentry
01/27/2017 03:30 AM
 - DC-T50 Install Roof shingles ::
- Roofing- All tasks
03/08/2017 05:00 PM
- In Progress:**
 - DC-T158 Roof trusses construction ::
- Finish coat
01/17/2017 03:30 AM
 - DC-T30 Set Roof trusses ::
- Roof and Basement carpentry
01/17/2017 03:30 AM
 - DC-T123 Soil test ::
- General
07/19/2017 08:30 PM
 - DC-T151 Wood polishing ::
- Electricity and wiring- All tasks
01/12/2018 05:00 PM
- To be tested:**
 - DC-T41 Plumbing layout ::
- Plumbing- All tasks
02/13/2017 05:00 PM
 - DC-T170 Paint patch testing ::
- Finish coat
04/27/2017 08:30 PM
 - DC-T109 Primer coat for windows ::
- Roof and Basement carpentry
08/16/2017 05:00 PM
- Closed:**
 - DC-T183 Prepare client list for walk through ::
- Walk-through check list
 - DC-T186 Walk-through day plan ::
- Walk-through check list
 - DC-T188 Compliance paperwork ::
- Protocol and Procedures
 - DC-T189 Audit phase-1 ::
- Protocol and Procedures
 - DC-T190 Audit Phase-2 ::
- Protocol and Procedures
 - DC-T1 Supply Lot sale agreement ::
- Legal agreements
10/05/2016 04:30 AM



Zoho Projects



Trello



Clickup



CCHiFirm

Time Management Tools



Clockify (Live Demo)



Evernote



One Stop Solution for all Work From Home Needs



CALENDAR



GMAIL



HANGOUTS



GOOGLE PLUS



GOOGLE DOCS



GOOGLE SHEETS



GROUPS



GOOGLE SLIDES



GOOGLE DRIVE



SITES



GOOGLE FORMS



DRAWINGS

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

Home

My Meetings

My Webinars

My Recordings

Settings

Meeting

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

Meet Now!

Want to schedule an online meeting in advance?

Schedule a Meeting

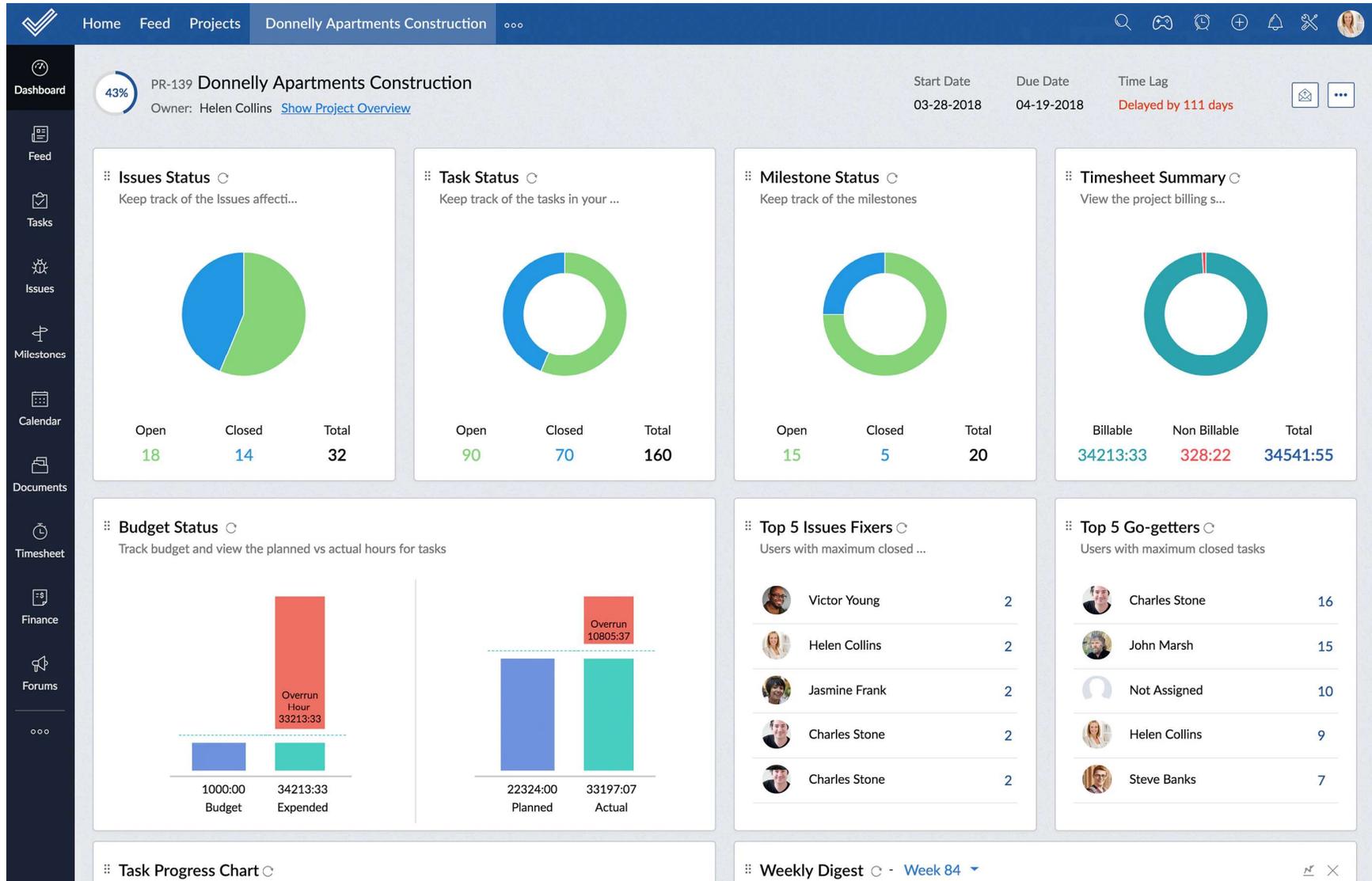
Webinar

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

Schedule a Webinar

(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

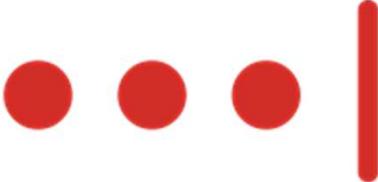
As the Business Is On Don't Miss out your Transactions relying on Desktop Based Accounting

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!



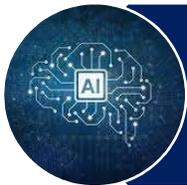
Few Things which you can learn while you are at Home?



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.***