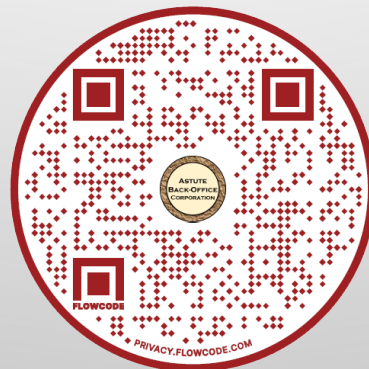


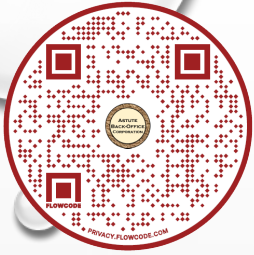


# DIGITAL ORGANIZATION

SUSAN WONG & MARK SILVESTRI

ASTUTE BACK-OFFICE CORPORATION





# ABOUT ASTUTE BACK-OFFICE (ABO)

- FOUNDED BY:
  - SUSAN WONG - ORGANIZATION EXPERT
  - MARK SILVESTRI - DIGITAL RECORDS EXPERT
- DIVERSE CLIENTS – COMMERCIAL, GOVERNMENT AND INDIVIDUAL
- TWO KEY AREAS: BUSINESS SERVICES AND **GENERATIONAL SERVICES**
- LOCALLY BASED, BUT WE'VE TRAVELED THE COUNTRY AND CAN HELP REMOTELY

**WE OFFER A UNIQUE SERVICE!**

***WE HANDLE YOUR CHALLENGING BACK-OFFICE NEEDS!***

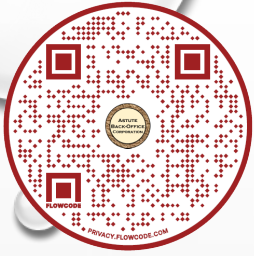
**To Do .... TO DONE!!**

**www.AstuteBackOffice.com  
(972) 637-9400**

SusanW@AB-OC.com

MarkS@AB-OC.com





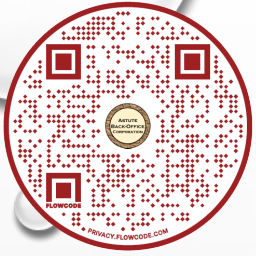
# WHY ARE WE HERE TODAY?

TO DEFINE AND UNDERSTAND:

- STEPS TO REDUCE YOUR PAPER AND DIGITAL FOOTPRINT CHAOS
- WHAT IS DIGITAL RECORDS MANAGEMENT?
- HOW TO TURN MODERN DIGITAL RECORDS CONTROL TO YOUR ADVANTAGE
- THE SIMPLE SECRET OF EFFICIENT RECORD CONTROL

Let's get started!





# DAILY CHAOS OF THE INFORMATION BARRAGE

- CONTINUOUSLY ACCUMULATES
- NEVER AUTOMATICALLY REDUCES
- ALWAYS HAS MULTIPLE CATEGORIES
- NEVER SELF ORGANIZES
- OCCUPIES SURFACES THROUGHOUT YOUR HOUSE

**“If it ain’t broke, don’t fix it.” NOT !!!!**





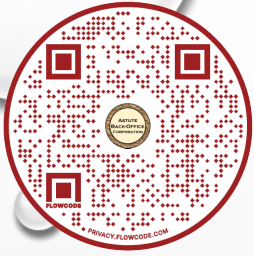
# WHAT IS DIGITAL RECORDS MANAGEMENT?

*Technology and approach to turn your “TO DO” paper piles & digital footprint into organized on-line information*

- FIRMS UP YOUR MANUAL PROCESSES
- SECURES YOUR INFORMATION ON-LINE (CLOUD)
- REDUCES CLUTTER
- ALLOWS ACCESS CONTROL BY YOUR RULES

Reduce touch time and increase free time -- safely!





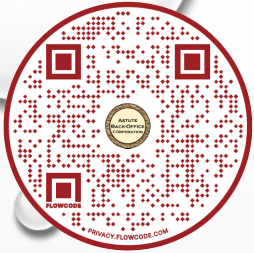
# HOW TO DO DIGITAL RECORDS MANAGEMENT?

Steps	ABO Can Help
Identify the information to control	✓
Identify the source of the controlled information	✓
Create a specific process for your information categories	✓
Pick a cloud storage location for your information categories	✓
Map sources to your cloud storage location categories	✓
Automate information storage wherever possible	✓
Perform digital record management tasks consistently	✓

\* We can also recommend other supporting disciplines like legal, accounting, insurance, real estate

**Make some guided choices!**



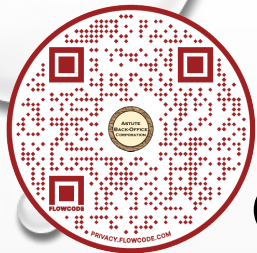


# THE SIMPLE SECRET TO EFFICIENT RECORD CONTROL

Establish a repeatable process,  
and execute consistently!

Efficiency leads to more free time and less wasted money!





# GENERATIONAL SERVICES FOR INDIVIDUAL & FAMILY

## **Generational Services to manage and reduce clutter:**

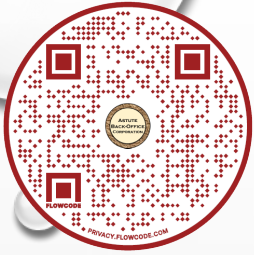
- Personal Information Organizer – family, financial, insurance, medical, assets, estate documents
- Consolidate monthly, quarterly, and annual statements
- Assist in reconciliation of accounts
- Document and inventory valuables – jewelry, artworks, firearms, and other collectables
- Secure and consolidate UserIDs and Passwords

**ABO can transition you to digital recordkeeping.**

**Never ending stuff that keeps growing!**







# WHY ABO?

- PROVEN DIGITAL ORGANIZATION EXPERIENCE
- CUSTOM RECORDS ORGANIZATION DESIGNED TO YOUR NEEDS
- EXCEPTIONAL CUSTOMER SATISFACTION
- LEVERAGE THE SIMPLE SECRET TO EFFICIENT RECORD CONTROL

We can help!

***WE HANDLE YOUR CHALLENGING BACK-OFFICE NEEDS!***

**To Do .... TO DONE!!**

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# Free One Hour Personal Consultation

We assess your current state of affairs and provide custom solutions to meet your needs.

Astute Back-Office knows one size does not fit all!



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