

Sample resources

Resource	Benefit
Assignment	List of work staff is expected to perform each day, including description, type of work, client, due date, priority, estimated duration
Steps, in order	So that work can be performed consistently, efficiently and effectively
Checkboxes	So that each step can be checked off as completed; deferred work can be restarted at the next unchecked step
Link to perform the work	Quick access to get it done
Link to procedure guide	In case staff needs further guidance related to how the firm does things
Link to help site	In case staff needs further guidance related to how the app works
Link to outside resources	Client documents, holiday calendar, 401k upload site, IRS blank W9, etc
Time notes	For staff to document work performed for each instance they attend to the task; supporting documentation for work performed
Comments	Internal comments for performing the task or for documenting information or thoughts outside of the notes related to time spent performing the work
Timer	To track time resource associated to work assignments
Client info	Name, address, etc
Client contacts	Points of contacts at the client's business, attorney, insurance agent, etc
Client activity log	All other tasks, notes, email and meetings completed and scheduled for the client so that staff can work together collaboratively
Client time entries	All time logged on each particular task so that staff working on it can view previous work performed on the task
Client vault	Passwords, tax ID number, capitalization threshold, etc

