EFFICIENT AND EFFECTIVE BACK OFFICES

SEAN HALE CONSULTING

AGENDA

- 1. Hidden Savings
- 2. Right Tool
- 3. Time is Money
- 4. Outsourcing

LEGAL DISCLAIMER

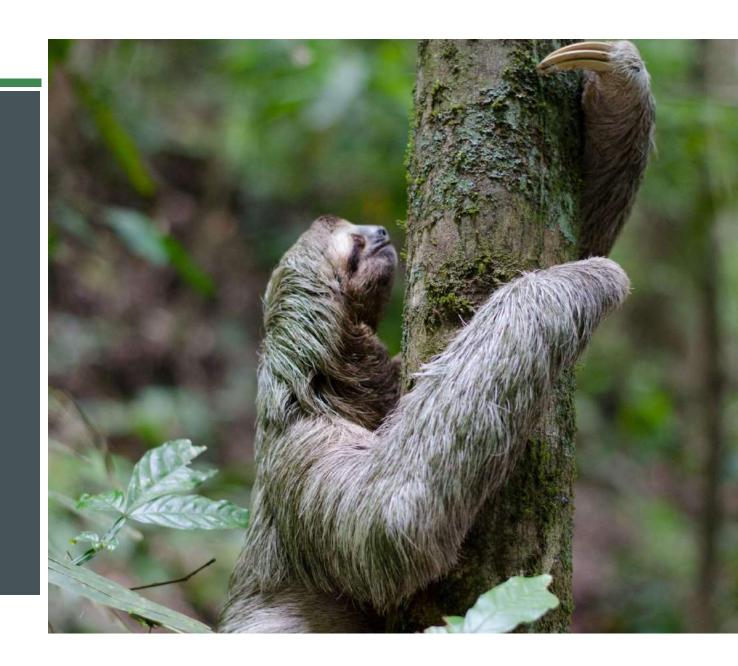
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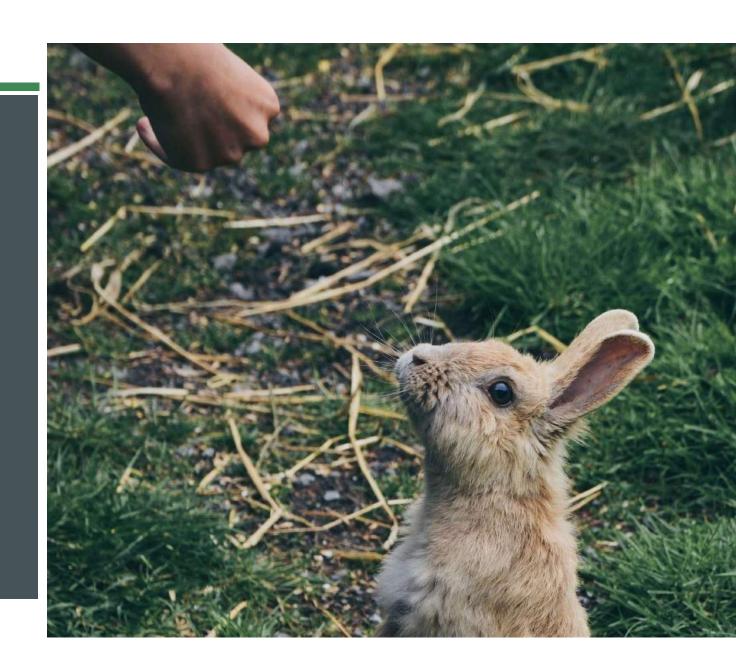
You should engage a professional to obtain advice with respect to any specific financial or operational matter to ensure it is applicable and appropriate to your particular situation.

TIP #1: HIDDEN SAVINGS

THE LAZY VENDOR



RESPONSIVE VENDOR



TIP #2: USE THE RIGHT TOOL FOR THE JOB SWISS ARMY KNIFE

SWISS ARMY KNIFE

VERSUS A WOODWORKING TOOLKIT



QUICKBOOKS IS....



A great bookkeeping tool

But not a great CRM

TIP #3: TIME IS MONEY

0,25 15

TIME IS MONEY

USE TIME WISELY

IS THIS WISE?



also - Tech is now a key part of the EE experience. If provide the right tech tools then you boost engagement and retention per HBR Feb 2020.

https://hbr.org/2022/02/in-a-hybrid-world-your-tech-defines-employee-experience?ab=hero-main-text Author, 2022-03-03T17:57:05.273

OR PENNY WISE (AND POUND FOOLISH)



TIP #4: OUTSOURCING

STAYING CURRENT WITH BEST PRACTICES



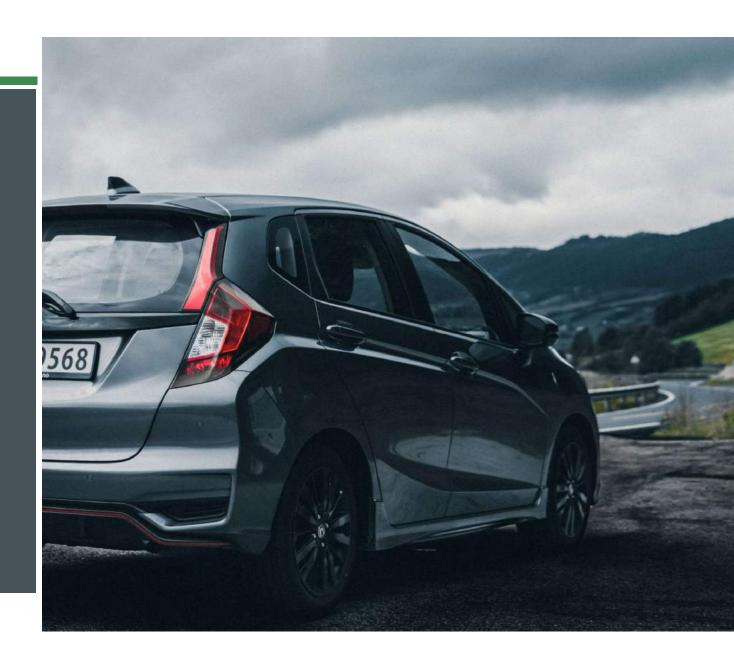
HOW STAY CURRENT + NOT BURN OUT?



GETTING BACK ON TRACK



OUTSOURCING



SUMMARY

1. Hidden Savings

2. Right Tool

3. Time is Money

4. Outsourcing

Vendor Review

Swiss Army Knife

Computers + Duct Tape

Jack of All Trades

SMALL GROUPS



What's your top takeaway?

■ Groups of 2-3

5 minutes

SHARE OUT



What's your top takeaway?

4 or 5 people

■ Then Q&A

QUESTIONS & COMMENTS?





CAN WE HELP YOU?

We help nonprofits build stronger back offices including administrative assessments, fractional CFO placements, and more!

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