

BPM

Simple Strategies to Maintain Back Office Productivity – Transition to a Virtual Bill Pay Solution

April 16, 2020

10:00 am – 11:00 am PT

Our Panelists



Bryan Rhody

Partner, Technology Solutions
BRhody@bpmcpa.com

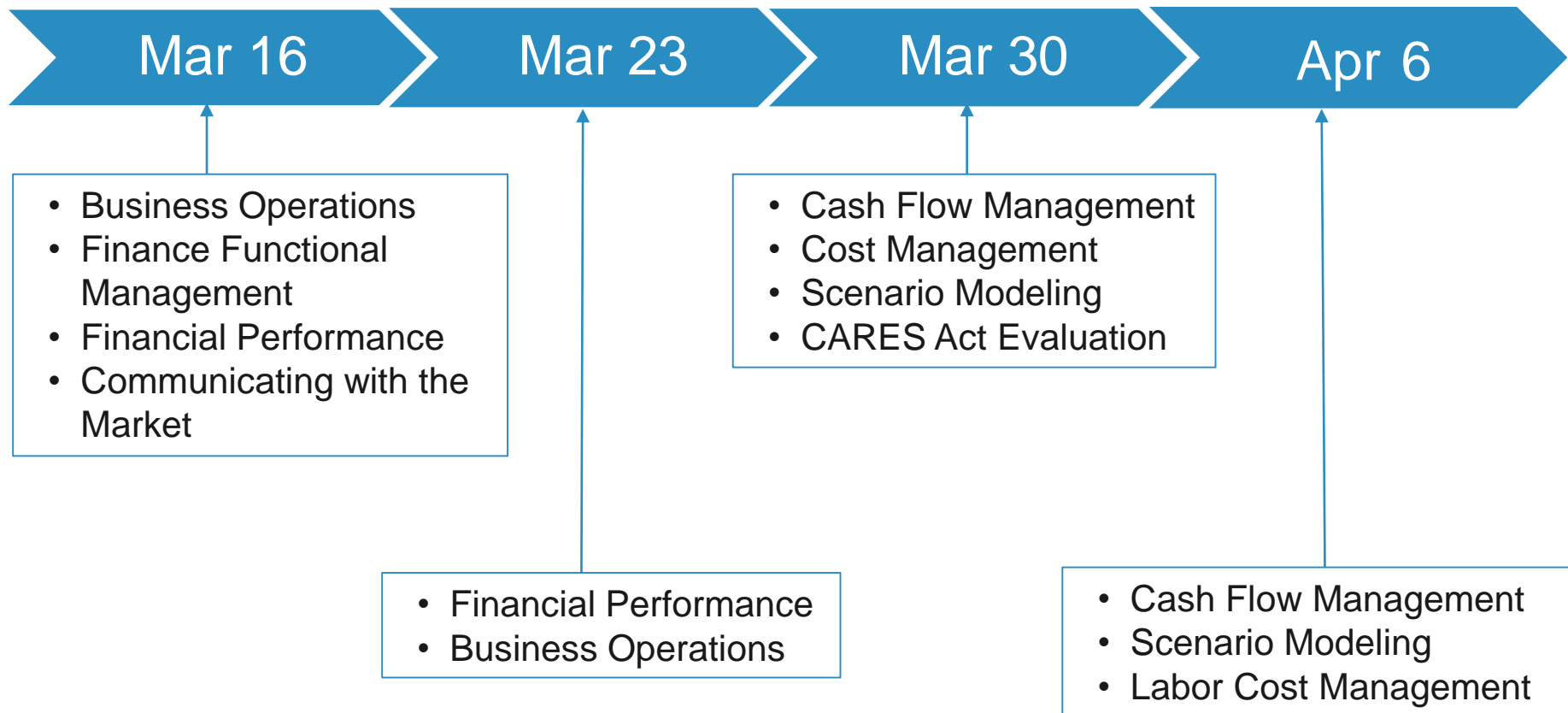


Brit Tompkins

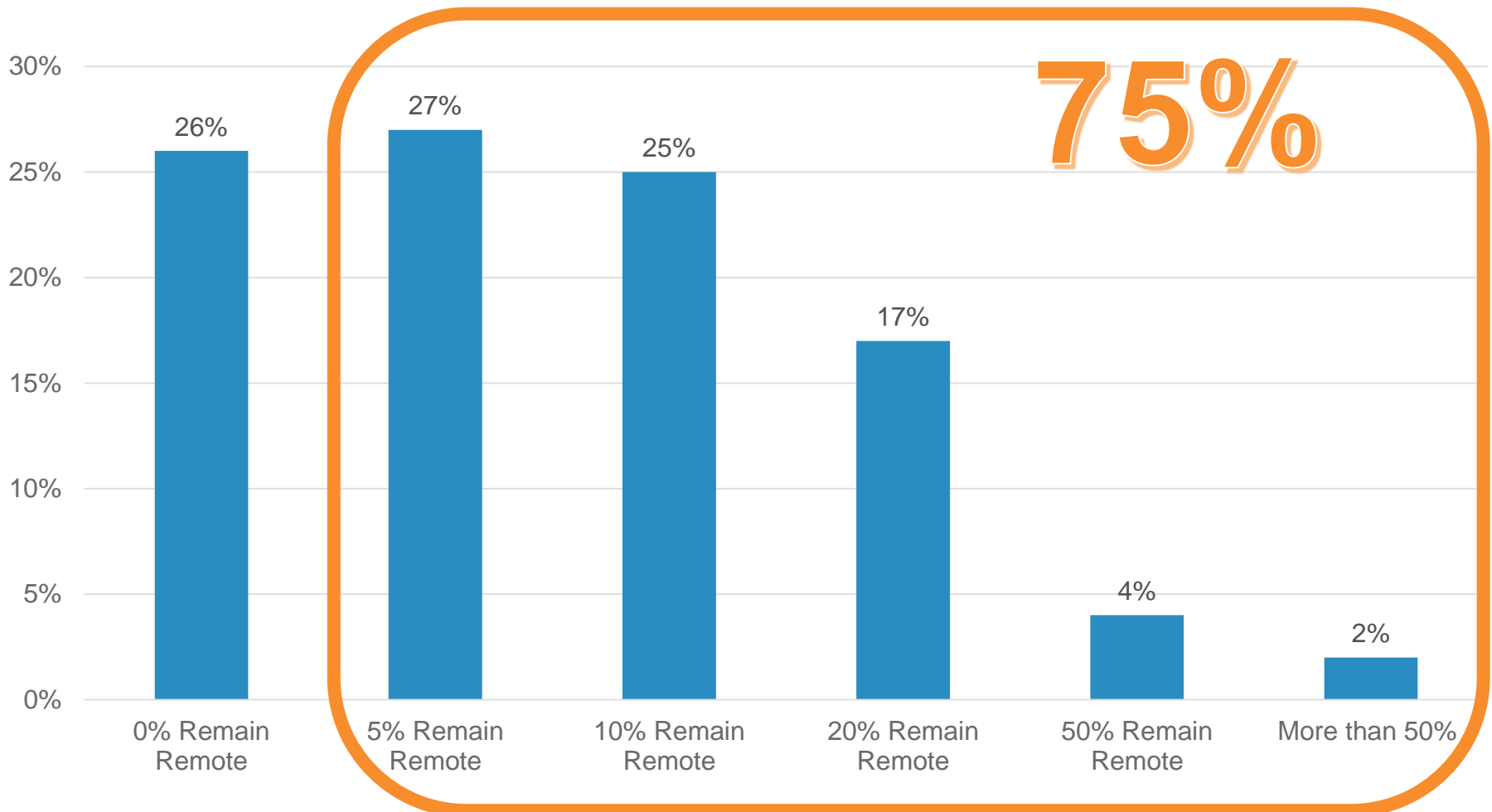
Director, Technology Solutions
BTompkins@bpmcpa.com

CFO Priorities

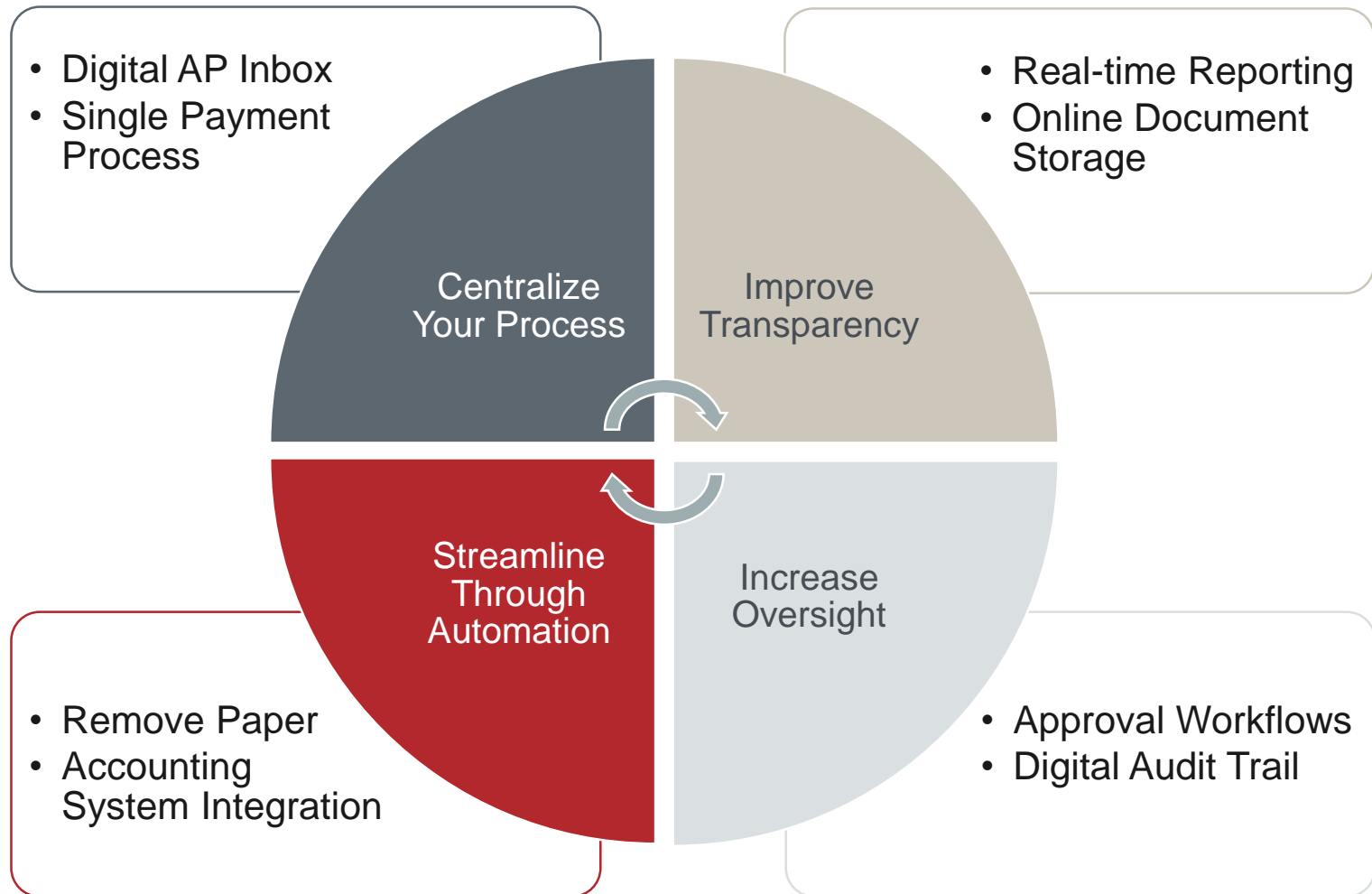
Gartner CFO COVID-19 Priorities Study



Shift to Permanent Remote Work – Post COVID-19

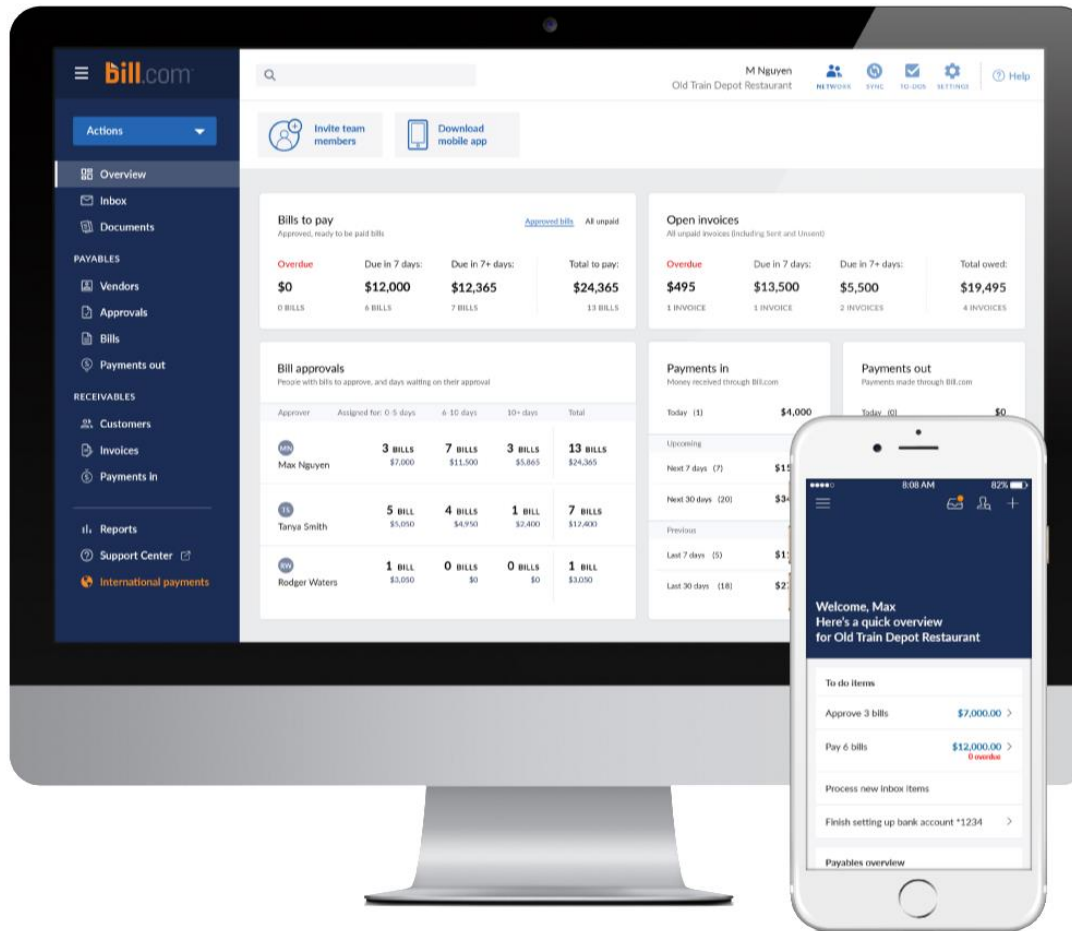


Strategies To Improve Your Accounts Payable Process



Bill.com Overview

Introduction to Bill.com



Bill.com Security

Designed With Firm and Client Security and Privacy In Mind



Application protections against unauthorized account access

Payment protections that reduce the risk of check fraud

Network and data protections to encrypt sensitive customer information

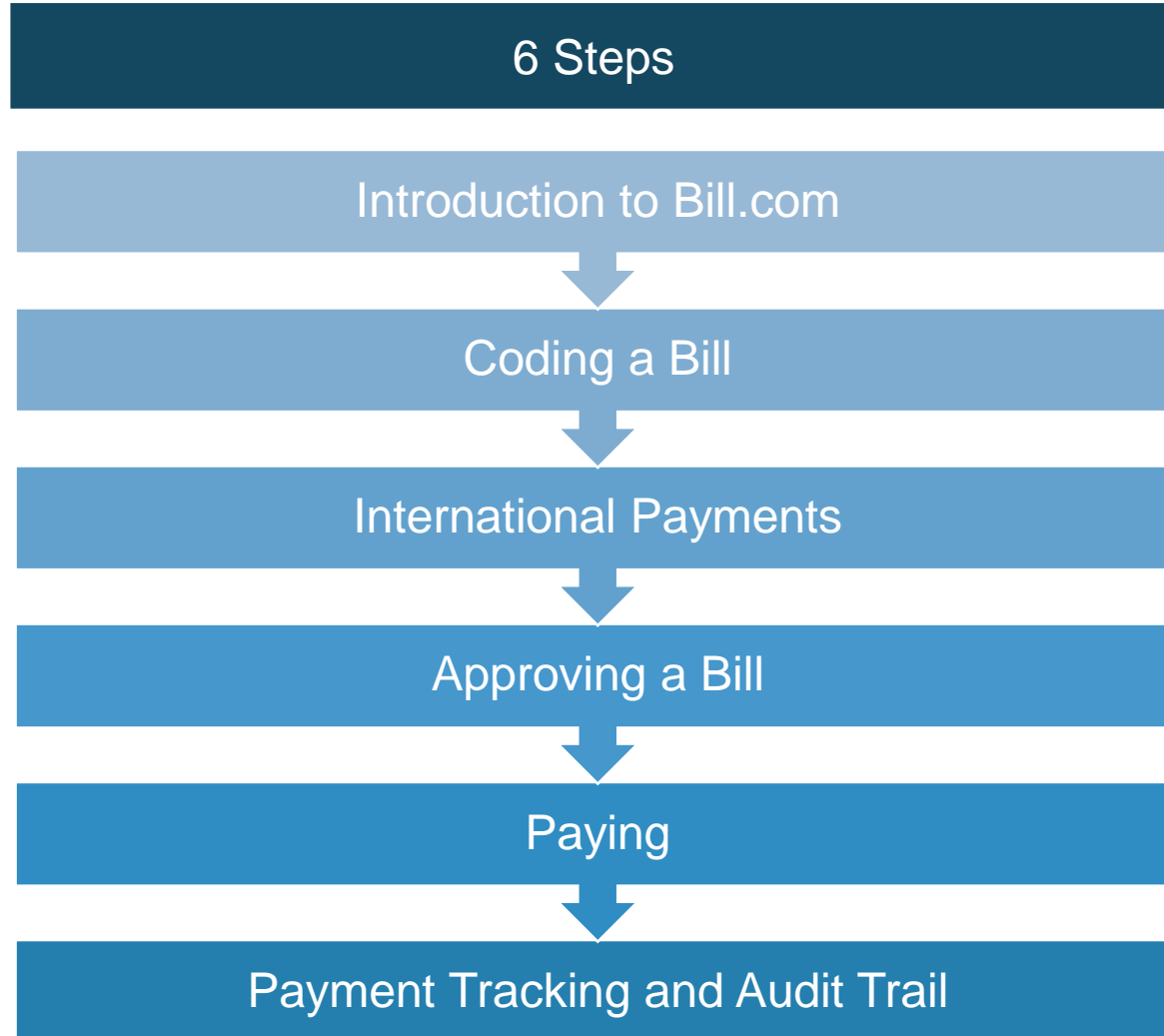
Physical protections to manage data center risks

Compliance protections to ensure our processes are certified by industry authorities

Learn more about Bill.com's security protocols at: <https://www.bill.com/security/>

Bill.com Demo

Bill.com Demo



Bill.com Benefits – Bringing It All Together

Increase Oversight

- Approval Workflows
- Digital Audit Trail

Improve Transparency

- Real-time Reporting
- Online Document Storage

Centralize Your Process

- Digital AP Inbox
- Single Payment Process

Streamline through Automation

- Remove Paper
- Accounting System Integration

How Can BPM Help?



STREAMLINED ONBOARDING

- ✓ Chart of Accounts Design
- ✓ Workflow Modelling
- ✓ Vendor Enablement
- ✓ Best Practices Recommendations
- ✓ Internal Controls Review

BILL.COM CONFIGURATION

- ✓ Personalized & Interactive Training
- ✓ Vendor Data Migration
- ✓ Electronic Payments Campaign
- ✓ Accounting Systems Integration
- ✓ Custom Roles & Permissions

SUPPORT & OUTSOURCING

- ✓ Transaction Accounting Assistance
- ✓ Continuous Training
- ✓ Optimization and Enhancements
- ✓ Custom Development and Scripting

BUSINESS TRANSFORMATION

Next Steps

BPM

- BPM will send an email following today's webinar that will include:
 - Webinar Materials and Recording
 - Bryan's and Brit's contact information
 - Onboarding Workbook

What Can You Do in the Meantime?

- Begin to evaluate your current process
- Start thinking of ways you can implement these strategies
- Be prepared to explain your current process and the bottlenecks you are facing

Q&A

Stay up-to-date with the BPM
COVID-19 Resource Center at
bpmpcpa.com/COVID-19