

# THE ANSWER TO YOUR PRAYERS...



**VIRTUAL SOLUTIONS  
FOR RELIGIOUS  
ORGANIZATIONS**



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*Leaders of religious congregations are often overwhelmed by the necessity of being modern corporate executives guiding a business, as well as guiding the spiritual lives of their members. Allow our expert teams to assist you in freeing-up valuable time and reducing overhead.*



## VIRTUAL SOLUTIONS FOR RELIGIOUS ORGANIZATIONS

### WHY "SMART" SOURCE?

- ◆ Meet the demands of running the day-to-day operations of religious establishments
- ◆ Focus on your core responsibilities
- ◆ Follow the lead of successful businesses and explore the advantages of "smart" sourcing
- ◆ Accounting
- ◆ Telecommunications
- ◆ Virtual Assistant
- ◆ Paperless Office
- ◆ Website management.



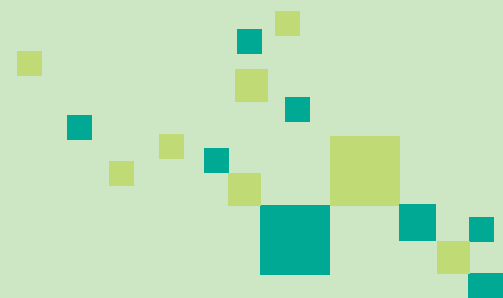
# HOW VIRTUAL ACCOUNTING MANAGER WORKS...



Center for Business Planning's "smart" sourcing Virtual Accounting Manager introduces "Ever Ready" Virtual-Financials. Technology has left monthly statements, and the wait for up-to-date financial information, behind. CBP's "Ever Ready" accounting system has year-end quality books and records available for you at 8AM every morning. Documents are sent by e-mail, fax or mail. Data is digitized, categorized and posted. All accounts are reconciled, and books and records are ready for presentation the following morning. Review the data for exceptions, act on problem areas and approve routine actions. You are then free to focus on your core responsibilities.

## Accounting Services Provided:

- ◆ Write-up
- ◆ Bookkeeping
- ◆ General Ledger Accounting
- ◆ Accounts Payable
- ◆ Accounts Receivable
- ◆ Fixed Assets
- ◆ Billing
- ◆ Payroll
- ◆ Sales Tax
- ◆ Bank Reconciliation
- ◆ Tax Return Preparation



# CALL ANSWERING SERVICES



In today's automated world, everyone appreciates a personal touch. CBP now offers managed inbound call center services at a very competitive price. We utilize the most current computer hardware and software systems available to fulfill all your contact center needs. Our prompt, courteous operators will provide a personal phone answering service for you, your staff, and members of your organization.

Rather than rely on an answering machine, or office staff that may be available only on a limited schedule, our 24-hour-a-day, 7-day-a-week operators can answer emergencies or calls for 'grief' needs. They take the call and relay it on to the on-call clergy. Operators can also call out, and let a coordinator know of the situation so they can make further arrangements after the on-call religious person had been notified.

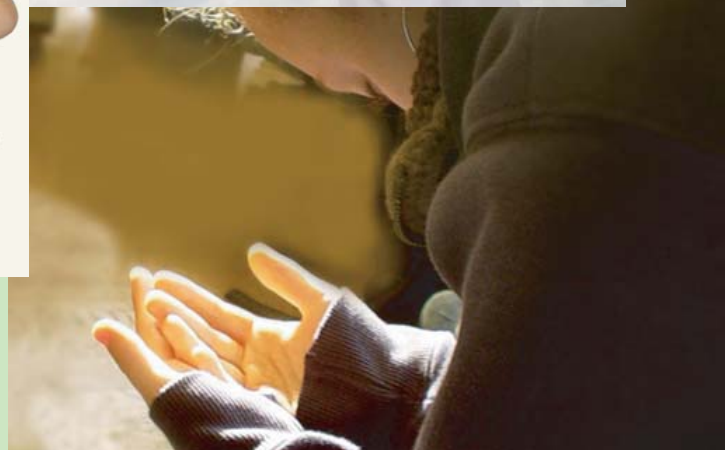
In other areas, the Call Center operators can take 'pledges' for fundraising drives — capturing credit information, and relaying it for the organization to process.

Registration for church sponsored events or classes, appointment scheduling for



many services provided by religious organizations, such as church food banks, counseling or other services, can be directed through the Call Center.

Voice mailboxes can also play an important part in notifying religious organizations' services when there is a need for something to be communicated privately. Operators can notify a mobile phone or pager that a message is waiting, without hearing what was left on the voice mail. Operators can even send the voice mail to an email address so the recipient can 'save' the recording if desired.



# VIRTUAL ASSISTANT SERVICES



- ✓ Assign your project by 4 PM, have it back by 8 AM
- ✓ Services purchased in blocks of 20 hours
- ✓ Use when needed, never expire
- ✓ Less expensive, more reliable than a temporary employee

CBP offers 'The Virtual Assistant' as a stand-alone service, or as an integral part of other services, providing you with an extra pair of hands when staff or a temporary worker is unavailable.

Work instructions given by the end of your working day are processed while you are asleep. Assign your project by 4 PM and have it back in your mailbox the next morning.

## Some ideas for VA uses

- ◆ Straight typing and transcription of dictation
- ◆ Spreadsheets
- ◆ Update and maintain database
- ◆ Bulk e-mailing
- ◆ Internet research
- ◆ Build a resource library
- ◆ PDF creation and conversion
- ◆ Scanning and OCR
- ◆ PowerPoint presentations
- ◆ Transcribe committee meeting notes
- ◆ Address labels





# PAPERLESS OFFICE

A Virtual Shared-Access filing environment allows for the creation of an electronic filing cabinet that reduces the overall workload, and consolidates information into a multi-user workflow environment that is secure and highly efficient.

- ◆ Create an electronic filing cabinet
- ◆ Eliminate filing mistakes, lost and misplaced files
- ◆ Recapture floor space for growth
- ◆ Improve overall business processes
- ◆ Highly intuitive and user-friendly interface

## Accelerate Workflow

- ◆ Improve efficiency and access information instantly
- ◆ Route folders or documents for action
- ◆ Communicate and share files using standard applications and email programs
- ◆ Preserve and capture business processes electronically

- ◆ Instant access to remote files
- ◆ Improve records quality and accuracy

## Uniting Document Management with Accounting

Virtual Paperless Office streamlines QuickBooks data entry and document filing into one consistent and efficient electronic process. Vendor bills, contributions, payments, and credit card expenses can be locally scanned or faxed from remote locations to a fax server

## Key Benefits

- ◆ Save time and increase productivity
- ◆ Reduce data entry and filing errors
- ◆ Find and file documents quickly
- ◆ Support your existing accounting and filing procedures
- ◆ Route documents with manual and rules-based workflow
- ◆ Send and share documents to any other user within the organization.



# WEB DESIGN AND MAINTENANCE



Our goal is to help every organization build and maintain the most optimal website, which will always be easily visible by the targeted audience. Use CBP's expertise to create exciting, informative websites, or to revamp existing sites. A successful website is a perfect mix of the right design and the right content. Our copywriters study your requirements in detail and devise professional copy that plays a key role in maximizing the impact of your site.

We use leading web technologies to build easy to use Content Management Systems for dynamic websites that need frequent updates, like adding a news story, changes in policies or procedures and organization information.

Fully supported and maintained by CBP, Content Management System development includes free usage training and support.

We provide database development, configuration, integration and maintenance services to help your website store data like authentication IDs, images, records, audios, videos, etc. It covers updates, e-mail management, FTP, administration, etc.

CBP offers annual maintenance contracts for the update/maintenance of existing site(s) for organizations that do not have the time or staff to maintain their own.



For more information on the services mentioned in this document, please contact a CBP representative today.

## Center for Business Planning

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