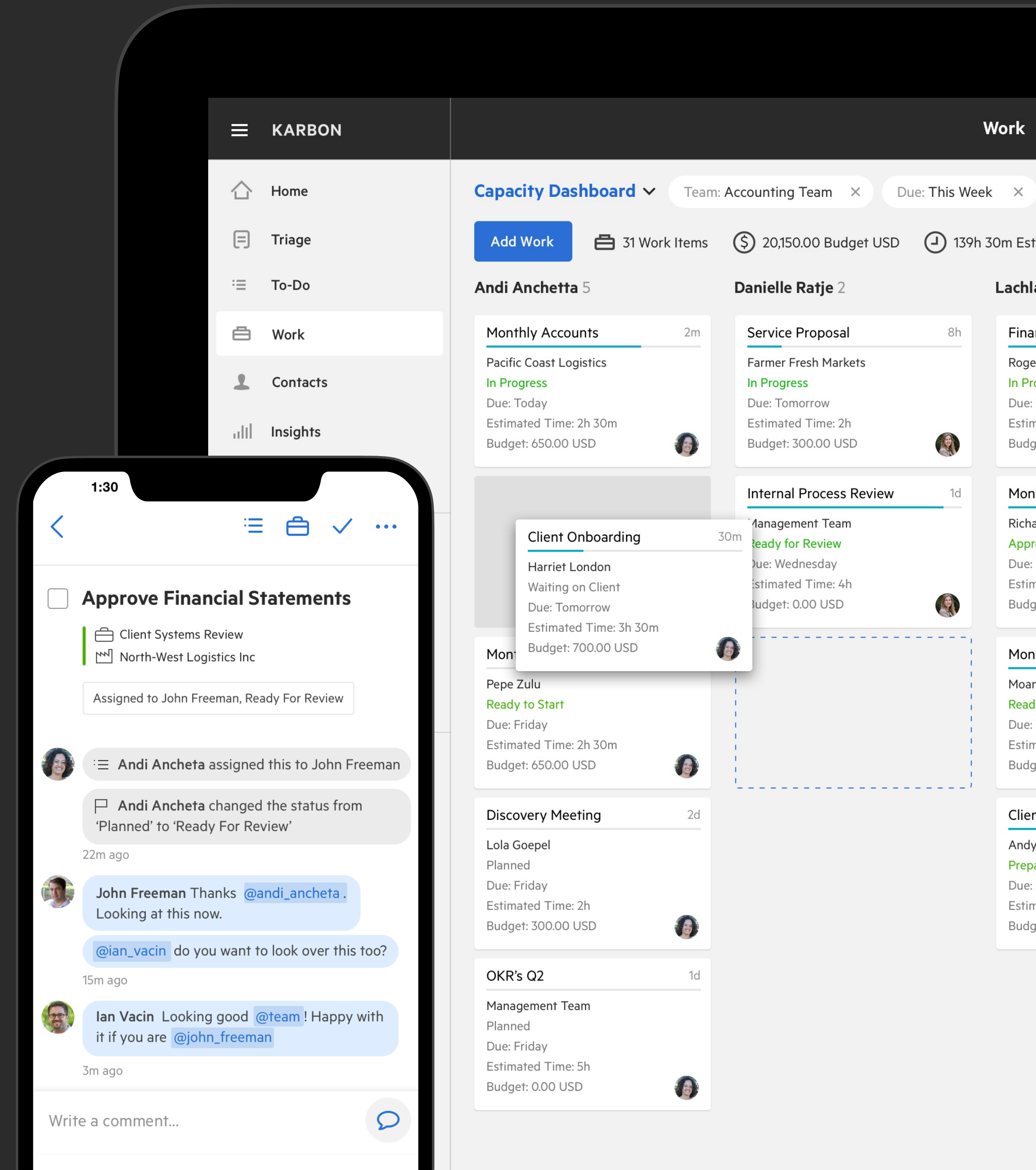




# Using Karbon to work with clients remotely

karbonhq.com



# Meet your hosts



**Miranda Kendell**

Karbon  
Managing Director, UK



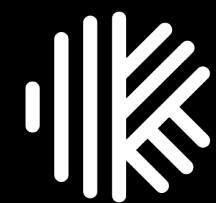
**Peter Grillet**

Karbon  
Customer Success Manager



- 1. Close any open apps**
- 2. Ask and we'll answer**
- 3. Or email [miranda@karbonhq.com](mailto:miranda@karbonhq.com)**

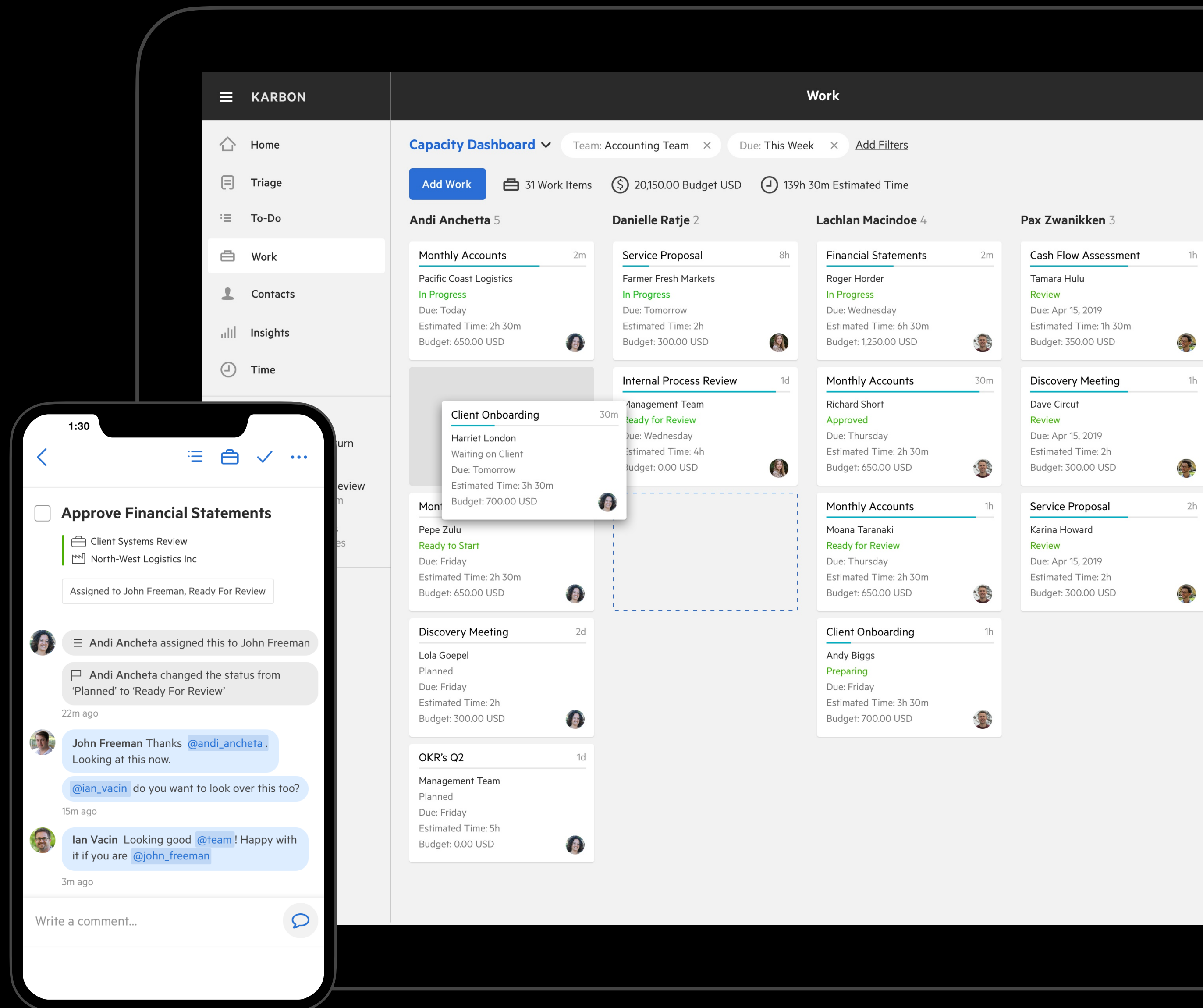




# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



**How much time do your employees spend  
chasing clients for data, every week?**

[karbonhq.com/client-tasks-time-savings](https://karbonhq.com/client-tasks-time-savings)



karbonhq.com

# Working with clients in Karbon

- Schedule Client Tasks
- Set Auto-Reminders
- Standardize across your firm in Work Templates
- Schedule Recurring Work automatically
- Gain clarity over client communication with Contact Timelines
- Report on client efficiency, workload and more with Insights



# Demo



# Questions





# Thank you

Get started at [karbonhq.com](https://karbonhq.com)  
Follow us on twitter [@karbonhq](https://twitter.com/karbonhq)

[miranda@karbonhq.com](mailto:miranda@karbonhq.com)

