

5 SIMPLE TOOLS

TO BE MORE EFFECTIVE IN 2018



1. AUTO FILER

Auto Filer allows you to bulk file documents in your document management system or Windows folder tree. Once your client reporting software has completed its job, use Auto Filer to streamline the process of batch filing reports for archiving and/or compliance.

[Learn more](#)



2. 15FIVE

15Five is an excellent little tool for tracking internal communication (especially great for reporting to management) that is used by LinkedIn, American Red Cross, Citrix, and more. It's a great way to do regular check-ins, ensure company culture, and facilitate conversations. Kevin Day, CEO of Trumpet, Inc. says, "I could not be successful in my job without 15Five!"

[Learn more](#)



3. PUBLISHER

Uploading documents to your client portals has never been easier. Integrate Publisher with your web-based portal to batch upload files directly to the correct client folder.

[Learn more](#)



4. BOOMERANG FOR GMAIL

Boomerang for Gmail is a free Gmail add-on (although there is a paid premium version) that has tons of handy features, such as pausing incoming emails, sending emails back to the top of your inbox later, scheduling emails for sending later, and seeing how likely it is your email will receive a response.

[Get it here](#)



5. OCR

Optical character recognition (OCR) is a critical component to getting the most out of your document management system. This software "reads" every document in your system and transforms them into searchable files (think .pdf and .tiff files). Get a 100% automated solution like [Symphony OCR](#).

[Learn more](#)