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# Episode 1 Data – What is it?

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ACCOUNTING AUDIT TAX EMPLOYEE BENEFITS SPECIALIZED SERVICES

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# EPISODE 1: WHAT IS DATA?



# Good Data vs Bad Data

- What is Data and why is it so important?
- How can we differentiate between good and bad data?
- What are some possible outcomes of good data vs bad data?





# Identifying your data

- What does the term "Data" encompass?
  - Paper trail/documents
  - Electronic information
  - Customer information in files
  - Etc.





# Managing your data

- Who manages the data?
  - Right person in the right seat
- How is the data managed?
  - Storage system?
  - Banker Boxes?
  - Accounting System (QB?)
- What does a successful data management solution look like?



# Information Workflow

• Why should we identify how information moves through a company?





# Retention of Data

- Lifecycle
- Pros and Cons of keeping long term retention





# FINAL THOUGHTS?

# **QUESTIONS?**







- Episode 2: Ecosystem, Not Just for Plants Anymore Tuesday, October 6<sup>th</sup>
- Episode 3: QuickBooks, Online and Desktop Battle it out! Tuesday, October 20<sup>th</sup>
- Episode 4: Payroll, More than a Necessary Evil Tuesday, November 3<sup>rd</sup>
- Episode 5: Apps, So Many Choices! Tuesday, November 17<sup>th</sup>
- Episode 6: Wrap-up, What does it all add up to? Tuesday, December 3<sup>rd</sup>



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