

WELCOME PACK



WELCOME I'M KATE

Having spent my life working in the office environment along with running my own businesses, I have extensive experience in financial management, administration, marketing, call handling and HR and just about everything that happens in the back office.

I'm passionate about helping business owners reclaim their time by streamlining operations, so that they can achieve their business aspirations. Myself, and my team are committed to your success.



WE ARE EXCITED TO WORK WITH YOU!

We are genuinely excited to work with you and bring value to your business. We understand that every business is unique, and we're committed to providing personalised support tailored to your specific goals and challenges. We believe in open communication and collaboration, and we're eager to learn more about your vision and how we can help you achieve it. From streamlining your back-office operations to providing strategic guidance, we're dedicated to being a valuable and trusted partner every step of the way.

WE'RE DESIGNED TO HELP YOU SCALE...

Whether you need a few hours a week, full-time support, or help with a one-off project, we're here to help. As one of our valued clients, you will have access to our knowledge too, so if you're looking to upgrade to software, wanting to track your social media successes, or just need your accounts reconciled we're here to assist you.



A handwritten signature in black ink, appearing to read 'Kate', written in a cursive style.



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Thank you

 01608 755608

 help@paperworkteam.com

ABOUT US



Our mission is to deliver a tailored, reliable, and comprehensive service. You'll find that nothing is too much trouble and that our Team will go above and beyond to ensure that you have the support that you need, when you need it.

As our slogan says **"Can you just?... Absolutely we can"**



MEET THE TEAM

HI, I AM PAULA

I'm here to ensure that you have everything you need and that the experience of working with us is smooth and efficient. I'll be here to guide you through setting up our systems and answer any questions you might have.

Think of me as your personal point of contact - no question is too big or too small. Feel free to reach out to me directly if anything is unclear or if you need any additional support.

The Team is eager to get started, and as soon as I have completed setting up your account in our systems, they will contact you to introduce themselves, discuss your priorities, and how they can provide the best possible support.

Welcome aboard!

Email: office@paperworkteam.com

Phone: 01608755608



ONBOARDING STEPS

OUR GOAL

Our goal is to simplify your processes and ensure you have up-to-date information that you can use to make great business decisions. By following these steps, we can ensure that the transition to using us is smooth and successful, setting the foundation for a successful and long-term partnership.



1 ONBOARDING DOCUMENTATION

We'll help you set up or grant access to the information we need to provide your service. This might involve using specific software or appointing us as your agent to submit tax returns to HMRC.

We'll also ask you for your identification documentation, if we haven't had this already, so that we can comply with the anti-money laundering regulations too.

2 YOUR TEAM

We'll introduce you to the key person or people in our Team who you will be working with. They'll be the people to contact for any questions or requests that you might have. You'll build a strong working relationship with them, and they're always happy to help. Don't hesitate to ask if you need anything.

3 KICK OFF

We'll schedule a kick-off meeting to review your current processes, confirm our understanding of the scope of work, and answer any final questions you may have. Once we're aligned, we'll get started and you'll see results.



WHAT TO EXPECT

Strict confidentiality and data security

Honest, clear communication



Proactive and responsive support: We'll anticipate your needs and address your queries promptly.

Customised solutions: We tailor our services to your specific business needs.

Dedicated point of contact: You'll have a consistent contact person who understands your business.

Regular progress updates: We'll keep you informed about the status of your work and any important developments.

Collaborative approach: We'll work closely with you and value your input.

Continuous improvement: We're committed to refining our services and processes to better serve you.



KICK OFF CHECKLIST

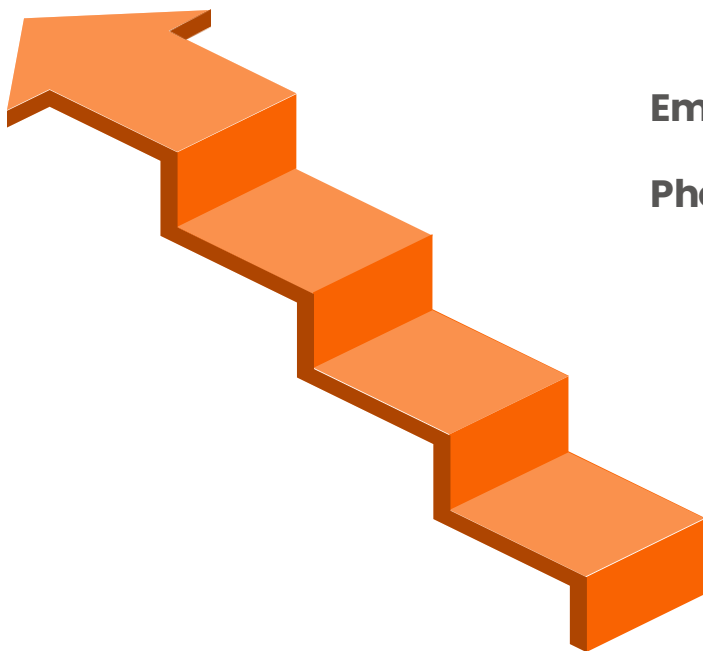
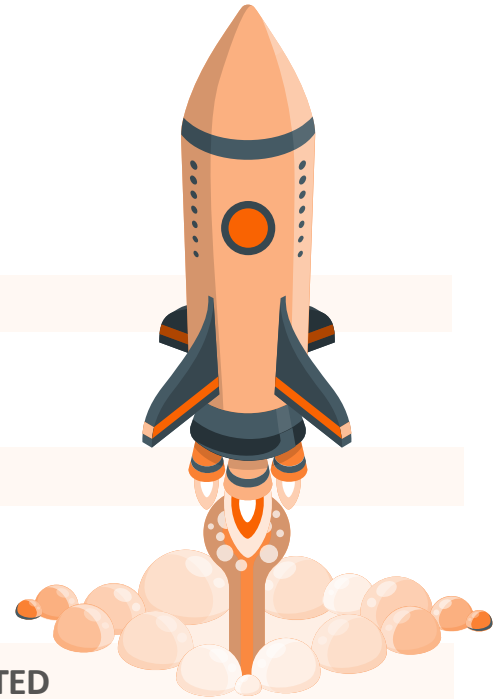


KICKOFF CHECKLIST

COMPLETE ONBOARDING STEPS

SET UP YOUR DIRECT DEBIT

KICK-OFF MEETING TO GET YOU STARTED



Email: office@paperworkteam.com

Phone: 01608 755608



COMMUNICATION



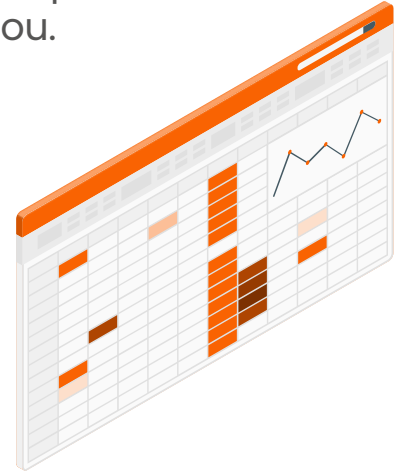
NORMAL BUSINESS HOURS

Monday to Friday 9:00 am to 5:00 pm.

If you require an appointment outside these times, just speak to one of the Team, and we will do our best to accommodate you.

RESPONSE TIME

Our team is committed to responding to all enquiries promptly. However, if your request is urgent, please make us aware of the timescales when you contact us and we will do our best to help.



AVAILABLE CONTACT OPTIONS

Email: Ideal for detailed enquiries, document sharing, and non-urgent communication. It provides a clear record of our conversations and agreements. please send to office@paperworkteam.com

Phone Calls: 01608755608 Best suited for urgent matters, immediate decisions, or when a more personal touch is needed.

Video Conferencing: Perfect for comprehensive discussions, face-to-face meetings, or when visual presentations are involved.



PROJECT TIMELINE

PROJECT TIMELINE

INITIAL ASSESSMENT

Initial review of your current processes and records by your dedicated team.

● **Week 1**



● **Week 2**

INITIAL CALL

Introduction to your team and kick-off meeting to discuss priorities, requirements and way forward.

NEW IMPLEMENTATION

Implementation of streamlined processes and workflows including integration with new software where applicable

● **Month 1**

● **Month 2**

ONGOING

Ongoing assessment of processes, communication and continuation of improvements.

REVIEW

Team review and future goal setting.

● **Month 3**

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ADDITIONAL SERVICES



THE COMPLETE BACK-OFFICE SERVICE

We have **expert teams** within our Team so that you can have the very best services all in one place. Use one or more of us to add time and extra skills when you need them, **short or long-term**.



Finance - bookkeeping, payroll, cash flow, budgets, profitability, planning

Self-Assessment - sole traders, CIS, landlords, high earners

Digital Marketing - brand creation, social media, campaigns, websites

Human Resources - recruitment, policies, procedures, support

Personal assistant - managing calendars, travel arrangements, concierge

Training - Xero, Excel, Word, Zoho CRM, databases

Reception - call handling, emails, holiday cover, client contact

Research - trends, competitors, markets, software

IT - data management, privacy, security, updates, training

Operations - support, planning, mentoring, training

Purchasing - planning, research, cost comparison analysis, budgets

Proofreading - websites, documentation, presentations

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FINANCES



BOOKKEEPING OR VFO?

Whether you need bookkeeping support or a full Virtual Finance Office (VFO), you'll have a fantastic team on your side, dedicated to your business's growth and success. We'll ensure you're compliant with the latest HMRC regulations, your accounts are always up-to-date, and we'll answer any questions you may have along the way.



Investment in our services provides expert financial support, accurate and up-to-date financial records, and the peace of mind knowing your finances are in good hands—all essential for informed decision-making and strategic business planning.

ALL BUSINESSES ARE UNIQUE

Because all businesses are different, we offer packages to suit all sizes and budgets. You may have already decided which is best for you right now. However, as your business grows and you need more financial support, more bespoke reporting, and the need for advanced features increases, we're here to help you upgrade seamlessly. We can easily adjust your package to meet your evolving requirements, ensuring you always have the right level of support and insights to drive your business forward. Just talk to us, and we'll be happy to discuss your options.

Bookkeeper or the full Finance function (VFO)? See our explanation of the differences between our services, so that you can make an informed decision based on you and your business's needs.



PACKAGE DETAILS

BOOKKEEPER

A bookkeeper is responsible for recording and maintaining financial transactions. Their primary duties include:

- Recording daily financial transactions
- Reconciling bank statements
- Managing accounts payable and receivable
- Generating financial reports (like profit & loss statements)
- Processing payroll (in some cases)

Key Focus: Transaction recording and basic financial organisation.

VIRTUAL FINANCE OFFICE (VFO) VIRTUAL FINANCIAL PARTNER

A Virtual Finance Office is a **broader financial service** that combines bookkeeping with **higher-level financial management and strategic planning**. A VFO typically includes:

- Bookkeeping services
- Financial forecasting and budgeting
- Cash flow management
- Compliance and tax planning support
- Virtual VFO services (financial strategy, risk management, and reporting for decision-making)
- Automation and integration of financial tools



Key Focus: Comprehensive financial management, from daily transactions to long-term strategy.

Which One Do You Need?

- If you just need **basic financial record-keeping**, a bookkeeper is enough.
- If you need **end-to-end financial management and strategic insights**, a VFO is the better choice.



FREQUENTLY ASKED QUESTIONS

How often will my books be updated?

Your books will be updated on a regular basis as per the package you have chosen, typically monthly. This ensures that your financial records are always current and accurate.

Can I switch bookkeeping packages?

Yes, you can switch packages if you find that a different package better suits your business needs. We recommend discussing any required changes with your dedicated bookkeeper.

How do I provide my financial documents to you?

Financial documents can be uploaded securely using our app, sent directly to your chosen software or via email to **office@paperworkteam.com** depending on the nature of the documents.

How can I access my financial reports?

You will receive regular reports based on your selected package, and additional reports can be requested from your Account Manager.



MARKETING

Social media marketing can be so time consuming, as well as mentally exhausting trying to keep up with the latest trends. There's the strategy, the set-up, formulating ideas, learning the platforms intricacy's, the photography, videography, editing, the list goes on. This is all before you even get to upload a post.

Our Marketing Team possess extensive knowledge of the social media platforms, so know the tricks and effective strategies required to optimise your brands performance and ultimately get results.

Not only that, but they are also skilled at creating and developing brands. They work with our clients to understand their vision and translate this into memorable designs that can be used across your website, social media, merchandise and stationery.

OUR SERVICES INCLUDE:




- Competitor Analysis & Market Research
- Strategic Social Media Management
- Video Content Creation & Editing
- Creating Engaging Content Creation (Visual & Written)
- Google Business Profile Optimisation
- Brand Identity & Logo Design
- Custom Website Design & Development
- Customer Relationship Management (CRM) Setup & Management
- Social Media Advertising Campaigns (Paid Reach)
- Email Marketing Setup & Management
- Content Marketing Strategy (Blog Posts, Articles, etc.)
- Analytics & Reporting (Social Media, Website, etc)
- Online Reputation Management
- Landing Page Design & Optimisation
- Marketing Automation Implementation
- And more...



MARKETING PACKAGES



The table below provides a pricing guide. We specialise in creating tailored packages to perfectly suit your business needs. Please speak to a member of the Team, if this is something you would be interested in.

 Premium Everything in Advantage & Essential plus £960 pm	 Advantage Everything in Essential plus: £620 pm	 Essential Core Features 1-3 sites: £470 pm
<p>Regular video and photo shoots: ^</p> <p>Our team of skilled professionals will capture stunning, high-definition images to be transformed into captivating videos and photographs. We're committed to creating content that not only looks incredible but also resonates with your audience.</p> <p>Community Management: v</p> <p>In-Depth Audience Research: v</p> <p>Brand Voice Development: v</p> <p>Advanced Analytics: v</p> <p>Social Media Crisis Management: v</p>	<p>Stories: ^</p> <p>We'll provide creative ideas and concepts for reels that will make your social media stand out.</p> <p>Dedicated project manager: v</p> <p>Monthly check-ins: v</p> <p>Analytics Tracking: v</p> <p>Targeted Ad Campaigns: v</p> <p>Website v</p>	<p>Optimisation: ^</p> <p>We'll work with you to create a cohesive brand look, using the various settings on the platforms to maximise visibility and reach.</p> <p>Content Creation: v</p> <p>Tailored messaging: v</p> <p>Regular Posting: v</p> <p>Content Calendar: v</p>
<p>Who is this ideal for? Established businesses seeking to optimise their social media presence, maximise brand visibility, deepen customer engagement, and drive sales.</p>	<p>Who is this ideal for? Businesses looking to expand their reach, create meaningful connections with their audience, and have a dedicated team managing their social media.</p>	<p>Who is this ideal for? Small businesses looking for a cost-effective solution to build their online brand, attract new customers and connect with their audience.</p>
<p>Get Started Today</p>	<p>Get Started Today</p>	<p>Get Started Today</p>



ADMIN / VA

Consider the additional revenue you could be generating if you could focus on your business and your customers instead of trying to get your head around those mundane tasks that zap so much of your time, energy, and brain power.

Here is a list of just some of the things you could ask our VA team to do:

- Filtering emails and managing spam emails
- Building your client database such as updating the contact details in your Client Relationship Management (CRM) system.
- Replying to customer service-related emails.
- Sending greetings e-cards, event invitations, etc
- Calendar management
- Appointment scheduling both personal and business
- Travel arrangements and planning
- Task management and reminder services
- Organising files in Dropbox, Google Drive and Office 365
- Data entry in Microsoft Word or Google Docs
- Creating and managing spreadsheets
- Preparing PowerPoint slides and presentations
- PDF file conversions such as splitting and merging files
- Transcription of video and audio files
- Simple eBook layout and formatting
- Preparing meeting minutes
- Project and task management between you and your team
- Forms and report creation
- Document template creation
- Online research
- Data mining, database development and lead generation
- Blog publishing management and moderating
- Replying to support tickets
- Etc etc etc .



The list is endless.



Building a thriving team requires navigating complex employment regulations and best practices. Keeping up with the latest laws on flexible working, implementing effective performance management, and ensuring compliance can be challenging. We take the guesswork out of HR with tailored solutions like robust contracts, clear policies, and expert dispute resolution. Our goal? To help you create a happy, productive, and compliant workforce, allowing you to focus on growing your business.

Employment

- Contracts
- Policies
- Procedures
- Administration
- Software
- Disputes



Your People

- Motivation and Management
- Personnel Problems
- Change Programmes
- Sickness and absence
- Employee Relations
- Holiday Entitlement

Recruitment

- Salary Benchmarking
- Best Practice
- Job Specifications
- Advertisements
- Correspondence
- Legislation

CALL HANDLING



We're here to handle your calls when you can't. So, you can be in when you're out.

Your callers will think you answered yourself. We provide a personalised call handling service, designed to seamlessly integrate with your business. Our friendly and professional team delivers a warm welcome and ensures your callers receive the same level of care you would provide. **The truly personal touch.**

NEVER MISS A CALL WITH OUR SERVICES:

- Virtual receptionist
- Message taking
- Overflow
- Call screening
- Holiday cover
- Helplines
- Call diverting
- Customer service



TAX RETURNS



LIMITED COMPANY ACCOUNTS

Limited company accounts can be complex, but TPT simplifies the process. Our experienced team handles everything from preparing accurate financial statements to filing your statutory accounts with Companies House, ensuring you meet all deadlines and regulations. We also manage your Corporation Tax return and self-assessment, minimising the risk of penalties and helping you optimise your financial results.

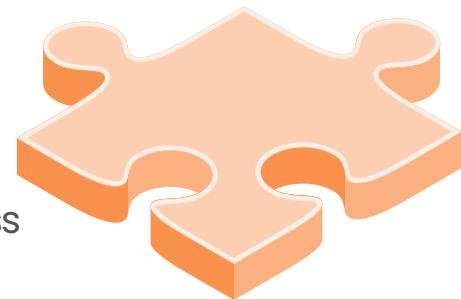


SELF ASSESSMENT

Self-Assessment and filing tax returns can be complicated too and understanding the ins and outs of tax laws and regulations requires a keen understanding of ever-changing rules.

Our expertise and careful attention to detail ensure you maximise your allowable deductions. This gives you peace of mind and takes away the worry of overlooking anything or making errors.

We will match you with one of our dedicated tax return specialists, who will get to know you and work closely with you throughout the tax return process.



- **Understanding You** – Getting to know your business
- **Clear Explanations** – No jargon
- **Expert Handling** – Let us manage your return stress-free
- **Flexibility** – Meetings tailored to you
- **Confidentiality Guaranteed** – Your details kept private



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WHAT OUR CLIENTS SAY

See what our clients say about us here and if you would like to discuss how we might help with your particular challenge, do give us a call.

We work with **businesses** of all sizes

Below are just some of the lovely things that have been said about us and our range of services.



"Kate at The Paperwork Team has been brilliant and has helped my company out by taking the stress out of PAYE and Pensions. I would definitely recommend The Paperwork Team to anyone."

Leigh Hopkins

LTH Electrical



"I used The Paperwork Team to learn how to use Xero. Although it is quite user friendly it is also very fiddly and Kate was an excellent tutor. She took me step by step, with great patience, explaining each step and repeating where required! She really knows her stuff and if something unusual came up that she had not encountered before she would just make a note, look into it after our session and come back with an answer. Very supportive and knowledgeable – highly recommended!"

Elizabeth Porterfield

BSL



"Kate's lead on moving our accounting to Xero has transformed our relationship with the Company finances. We are now able to keep up to date with where the Company stands financially with up to date lists of who owes us money and what bills are due. Realtime interaction with HMRC means PAYE codes are updated automatically and VAT returns which used to take at least a day to sort out and file are now done within minutes. Kate's flexible oversight and support continues to be invaluable and I cannot thank her enough."

John Bloomfield

SinCarne Ltd



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John Bloomfield

SinCarne Ltd



"Kate, thank you so much for your help and support during the last few (self-assessment) years! Your patience with my lateness went above and beyond. With best wishes. Sonia xx"

Sonia Hiley

Cotswold Angel



"Thank you once again for suggesting Xero and all your help it's so easy and you've made it easier for me with your excellent training."

Michelle Hirst

Bakers Arms



IN ADDITION

FINANCIAL TOOLS

We can provide access to a variety of financial reports, such as budgets, cash flow, invoice templates, and expense trackers, to help streamline your business operations.

RESOURCES & TOOLS

If you require any of the following and it is not already included in your package, please contact your Account Manager and they will organise a quote for you. Some add-ons come free of charge.

SOFTWARE TRAINING

For clients using financial management software, we provide training sessions to help you get the most out of your bookkeeping software.

DOCUMENT UPLOADER

Our TPT uploader app can be used to send documents to us securely, using your mobile device.

SPREADSHEETS

We can leverage our expertise in Excel to manipulate financial data and create bespoke reports tailored to your specific needs, going beyond the limitations of standard accounting software.



TERMS

LOOKING FORWARD TO WORKING WITH YOU!

We are dedicated to providing you with the highest level of service and support, ensuring that your needs are met with professionalism and care.

We believe in building strong, lasting relationships with our clients, and we look forward to the opportunity to contribute to the success and growth of your business.

The secret of getting ahead is getting started.

Let's get started!



BILLING TERMS

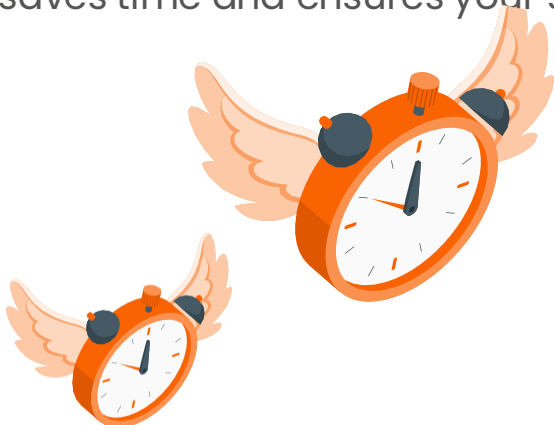
Our terms are strictly 14 days or as otherwise stated on our invoice, and we appreciate prompt payment, as this allows us to continue working on your project without interruption.

FULL TERMS AND CONDITIONS

For our full terms and conditions [Click here](#)

DIRECT DEBIT

Most clients benefit from using our direct debit option. Paying in this way saves time and ensures your services aren't disrupted.



THANK YOU

We are excited to work with you and look forward to contributing to your business's success.

Relax, breath and start enjoying your journey again !

