

# Estate Planning (and other) Forms Modernization

Increase Efficiency *and*  
Client Satisfaction

Unlock Office 365:  
Tools for Modern Success



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In Partnership With



# Introducing Your Co-Speakers/Hosts!



## Co-CEOs, NTC Tech Consultancy, LLC ([www.consultntctech.com](http://www.consultntctech.com))

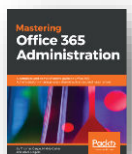
- **Authorized Microsoft Cloud Solution Partner**
- **Location:** Washington (state), US
- **Tech:** Microsoft/Office 365, Power Platform, CoPilot, related
- **Services:** consulting/strategy, organization IT transformation, collaboration solutions, AI, automated business process, modernized online forms, data visualization, documentation, migration, governance, adoption, training
- **Community Leadership**
  - [Ananse Tech Community, Co-Founders](#)
- **Current Memberships**
  - [International Association of Microsoft Channel Partners \(IAMCP\)](#)
  - [Black Channel Partner Alliance \(BCPA\)](#)
- **Other Industry Experience:** Construction, Manufacturing, Hospitality, Federal (DoD and non-DoD), government contractor, nonprofit, financial wealth, adult education, insurance, actuarial research, hospitality

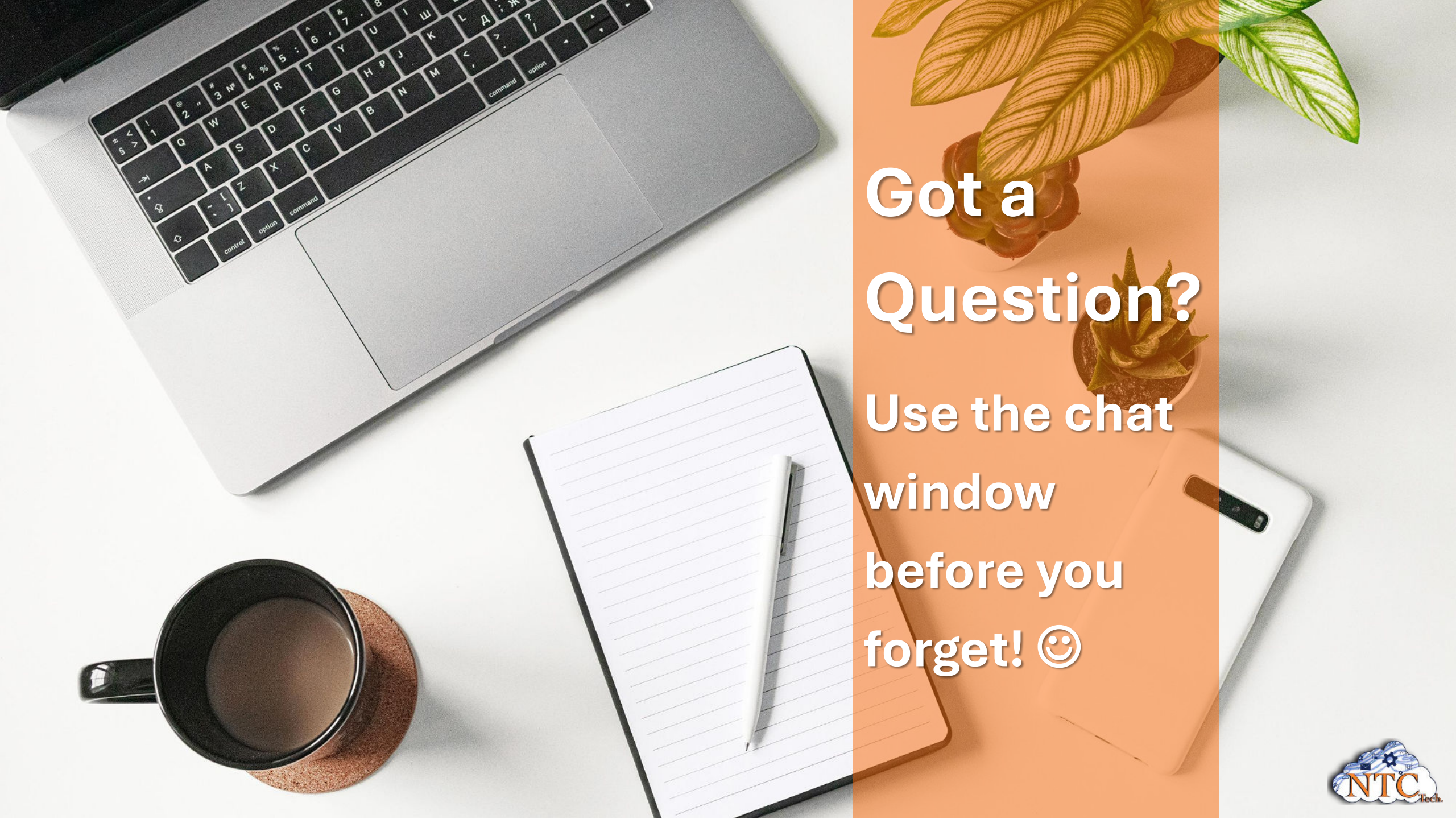


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**Got a  
Question?  
Use the chat  
window  
before you  
forget! 😊**

# Cloud Disclaimer

**Microsoft cloud technology is constantly being updated so please excuse any inconsistencies between our presentation, slides, and the current portal.**

# Today's Agenda:

## Unlocking Potential of Modernization

- Look at a typical Word form
- See transformation into modern form with database and automation
- Discover additional possibilities to make your work even easier!

Demo Time!

# Questions?



A group of five business professionals are gathered around a large wooden table in a library or study. A man in a white shirt and striped tie is pointing at a document on the table. A woman with glasses and a grey vest is looking at the document. An older man with a white beard and glasses is also looking at the document. A woman with dark hair is looking at the document. A woman with blonde hair is looking at the document. The background is filled with bookshelves. The text "Check Out Our Promos" is overlaid on the image in a large, orange, outlined font.

Check Out  
Our Promos

# Efficiency Booster Special - Training

Transform your team's capabilities and drive your business forward with our comprehensive introductory training. Designed to provide the essential foundation that your people need to be knowledgeable and feel comfortable using these modern productivity tools. Invest in your team's growth for only \$2000! Invite as many students as you want!

*\*\*\* Don't have a lot of employees? Feel free to invite other businesses to attend with you or pay \$150/student (min of 5)! \*\*\**

## What You Get:

-  1.5 - 2 hours of live, instructor led training with Q&A
-  Learn best practices and real-world scenarios to enhance learning.
-   Walk away with the training deck and recording of session 

## Choose Your Class:

-  Introduction to Microsoft Office 365
-  Introduction to SharePoint
-  Introduction to Teams
-  SharePoint vs Teams vs M365 Groups - Which to Use When?
-  Introduction to Outlook
-  Introduction to OneNote



# Efficiency Booster Special – Forms and Workflow



🤔 Are you still doing everything manually?

It's time to automate your business processes! From form submissions to approval workflows, we help you automate routine tasks, save time, and reduce errors—all while making your business more efficient and scalable. No monthly costs for the app. No additional setup fee.

## 💡 The Results?

- ✓ Save hours of manual work
- ✓ Reduce errors in data entry
- ✓ Improve visibility & tracking
- ✓ Scale business operations effortlessly



🚀 Choose your package:

### Basic Automation – \$2000

- ◆ Custom Forms & Workflow Automation – Up to 1 form with basic automation
- ◆ Simple Process Integration – Connect to 1 existing tool (e.g., SharePoint, Teams)
- ◆ Basic Notifications & Approvals – Automate email notifications & a single approval step
- ◆ Training & Support – 30-minute walkthrough session

### Smart Workflow Package – \$3000

- ◆ Everything in Basic Automation
- ◆ Custom Forms & Workflow Automation – Up to 3 forms with advanced automation
- ◆ Seamless Process Integration – Automate task assignments and integrate with 3 tools
- ◆ Multi-Step Approval Workflows – Support for up to 3 approval steps
- ◆ Real-Time Data & Reporting – Custom dashboards with basic reports
- ◆ Training & Support – 1-hour training session with Q&A

### Enterprise Automation – Custom Pricing

- ◆ Everything in Smart Workflow Package
- ◆ Unlimited Forms & Advanced Workflows – Automate complex multi-step processes
- ◆ Seamless Process Integration – Connect across multiple departments/tools
- ◆ AI-Powered Automations – Implement AI-driven decisions and document processing
- ◆ Real-Time Data & Advanced Reporting – Automated reports, dashboards & analytics
- ◆ Security & Compliance – Implement role-based access & audit trails
- ◆ Training & Support – 2-hour hands-on training session plus documentation

# Thank you!

## Feel free to reach out!



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**NTC Tech - 30  
Minute Meeting**



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