



Digital Tools for Modern Business Efficiency
Saturday, November 1, 2025 | 8:00am - 12:00pm

Agenda

8:00 – 8:15 Welcome & Opening Remarks

- Introduction and overview of the session's objectives.
- Relevance of digital tools and professional efficiency in modern surveying and business operations.

8:15 – 9:00 Digital Client Communication & Risk Reduction

- Using Zoom, Teams, and WhatsApp Business for client engagement and verification.
- Confirming appointments and instructions through digital channels.
- Secure communication practices that reduce exposure to field-related risks.
- Building trust and accountability through written, time-stamped correspondence.

9:00 – 9:45 Tools to Maximize Productivity in Field & Office

- Integrating cloud-based systems for real-time collaboration (Google Drive).
- Using project management tools (Trello, Asana, MS Planner) for task tracking.
- Applying Excel dashboards for cost and performance monitoring.
- Demonstration: creating a live cost-tracking model linked to cloud storage.

9:45 – 10:00 Break

10:00 – 10:45 Financial Stewardship & Compliance

- Managing cashflow and budgets for sustainable operations.
- Understanding tax obligations, deductions, and allowable expenses.
- Basic compliance with NIB, BIR, Companies Registry, and OPR.
- Demonstration: Excel-based financial tracker for small practices.

10:45 – 11:30 Future-Proofing the Surveying Profession

- Exploring the role of AI in administrative and operational efficiency.
- Adopting digital solutions for sustainable practice management.
- Leveraging technology to remain competitive in an evolving industry.
- Encouraging continuous learning and digital adaptability.

11:30 – 12:00 Wrap-Up & Q&A

- Summary of core concepts and digital integration strategies.
- Open discussion on implementation challenges and best practices.
- Participant feedback and CPD certification instructions.