

Remote Work Resources for Your Agency



If you aren't already, there is a strong likelihood that your agency may have to utilize a "work from home" model in the near future. Although insurance has generally been considered an "essential service" in the initial government orders we've seen in Tennessee and around the country, there is no guarantee that will continue. There is also the issue of staff safety and social distancing. If and when your agency moves to such a model, here are some resources to keep in mind (where available, resources have been linked for you):

Remote Access

The most basic question in this scenario is, "Does your staff have the capability to connect remotely?" That includes several levels, such as do they have or can they be provided with a computer at home? Do they have internet access from home? If they can get online, can they access needed work files? This would be the time to check the "cloud access" of your programs and files with your IT professional. If you need other options for remote access, consider programs like [Logmein](#), [Gotomypc](#), [RemotePc](#), [Teamviewer](#) and others.

Agency Management Systems

Hopefully your agency management system has a cloud option, app or other online interface (perhaps a [VPN connection](#)) that allows them to enter and retrieve data. If not, this will likely be a vital question for your remote work plan. If you can't provide it, develop a system where information is shared with one key contact at your agency who can enter the data. Use an Excel form or other template ([Google Sheets](#) is a free online option) that promotes standardization so that there aren't lapses. Then revisit the data when everyone returns to work.

Conferencing

To continue having meetings and discussions with your staff, it will be important to set up conference calls, video chats, etc. There are free resources out there like [Skype](#), [Google Hangouts](#), [Lifesize](#) and [Zoom](#). Some require downloads of software and may have limits, but your agency can investigate which one may be the best fit. If you need a smaller call (5 or less),

iPhones and Android phones allow "[Add Call](#)" as an option – just select it from your screen (assuming your phone's service provider allows it). Other options may be conference call services like [UberConference](#) or using a free trial from a service like [GoToMeeting](#) or [Join.Me](#). Just be sure to read any terms and restrictions.

Collaboration

Have projects that your team needs to work together on in a shared format? Programs like [Slack](#), [Microsoft Teams](#), [Basecamp](#), [Asana](#) and others can give you a platform to communicate, work on files, update project statuses and pool resources. Facebook even has a solution called [Workplace](#) (just keep in mind your data integrity).

Client Tools

Your clients will have new access needs as well. Look at the offerings made available by your carriers for client portals apps, and other tools. Consider programs like [DocuSign](#) for digital signature, [ePayPolicy](#) for online payments and other programs that allow remote ease of doing business.

Promote Routines

Try to provide some structure to the group as they learn this new environment. Schedule conference calls for your staff, encourage daily team meetings, have video happy hours, virtual lunches or other social options. Suggest people create a specific workspace and develop a workday routine.

Encourage Strict Cyber Security Measures

On top of everything else, cyber security is an even greater concern in times like this. When possible, encourage your staff to use a secure wi-fi connection or set up the security on their home's internet if they haven't already. Ask them to be extra vigilant on opening emails and links. Have them confirm any unusual requests like wire transfers or monetary transactions by phone.

Be a Resource

Do what you do best during times of hardship for your clients – be a resource. Try to provide useful information on business continuity, help promote initiatives to support your community and show the power of small business.