ACTUALIZING... COLLABORATION TOOLS
TO AID IN REMOTE WORKING

Due to current circumstances, many organizations have found themselves venturing into the new space of remote working. While most companies have their existing suite of collaboration tools to enable flexibility on location, it might not be enough infrastructure to ease the growing pains of a full work-from-home transition. At Actualize, we were an early adopter of Cloud Technology to support our internal team that has worked remotely for over 15 years, so we were prepared and seasoned for this shift. Using our experience through the years, these are the things we have found helpful to work remotely, efficiently, and with sufficient controls in place. As we have discovered, working remotely does not mean you have to sacrifice collaboration for flexibility; you just need to be a bit more creative.

ASSESSMENT OF CURRENT TOOLS

The first step is to take an inventory of the current tools you use to support your business. This list comprises examples of what we use at Actualize and what we see our clients using. Whatever you are using, remember that one program is not necessarily "better" than the other – it's all about what works for your organization. Make sure that whatever you have chosen, your team has had enough training to use the program efficiently.

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>
> JASON BLUMSTEIN

› **Communication** *(Google Hangouts, GoToMeeting, Slack, Skype, Zoom, Microsoft Teams, Google Docs, and Projectplace)*

› **Documentation** *(Google Docs, OneDrive, Microsoft Office Online, Zoho)*

› **Document Execution** *(DocuSign, ESign+)*

› **File Sharing** *(Dropbox, Hightail, Google Drive, OneDrive, SharePoint)*

› **Project Management** *(Asana, MS Project, Projectplace, Smartsheet, Trello)*

› **Software** *(Treasury Management, ERP, Financial Planning)*

› **Business Development** *(Salesforce, Zoho CRM)*

GAP ANALYSIS

The next step is to determine the areas in which you need to enhance your capabilities. Where do you see gaps in the use of the tools you are using to collaborate? For example, can you move to Cloud Technologies to streamline operations? Be thorough and honest in your analysis. It may be inconvenient to fix the things that aren't working well, but it will be worth it as you are more easily able to navigate challenges.

TIPS FOR ENHANCING COLLABORATION EFFECTIVELY

As a consulting firm, our job is to collaborate with our internal and client teams. How successfully we do this determines the future of our brand. Here are some tips:

Utilize electronic document execution.

This is likely a big challenge for many companies relying on paper. In the Treasury space, you can work with your banking partners to streamline paperwork requirements for opening/closing accounts, modifying signatories and providing instructions for borrowings/repayments.

› Will they accept emails or can you use a tool like DocuSign?

Implement document sharing.

Having multiple people working on a document at the same time is a key part of teamwork. At Actualize, we use a variety of tools because our entire firm is now remote. For example, we use Dropbox and Projectplace as our file sharing and place of record for more static files that may need version control. We use Google Docs for working items so that people can make changes simultaneously. When selecting a tool, you may want to consider which provides the most security and flexibility. For example – Google Docs allows you to permission edit/comment rights, and rather than exchange multiple emails on topics, users can highlight action items with comments and use of the "@" function to assign them.

Connect frequently with your teams.

It can be challenging to maintain personal connections while working remotely. Even though we were used to it for the majority of our work, we would frequently gather or be on-site with clients. Here are some ideas to foster team connection:

Mindful breaks: Schedule a 15–30 minute meeting on a theme that is not work related. For example, try two truths and one lie, show and tell, and other mindful exercises. This is a great way to break up the day and lift spirits.

› **Kerry Wekelo** posts a ton of options on LinkedIn and also hosts sessions periodically.

Video conferencing (turn on the camera): Promote the use of video to see your people. While this does not replace personal interaction, it is nice when you do not have the option to see each other frequently.

› Don't worry, most of us don't feel camera ready, but we're in this together!

Virtual happy hours: Take time to connect outside of working hours with your team. We often get to see our team members "work personalities," but we can connect on a deeper level when we see them for who they actually are.

1:1 meetings with direct reports: We are encouraged to meet with our direct reports on a regular basis, monthly at a minimum. It may be beneficial to increase the frequency of these meetings to have more touchpoints when the entire team is remote.

Team meetings: Start the meeting by asking how everyone is doing. Having empathy for teams is critical in trying times.

› Try to keep up some routines that you used to have when you were at the office. This could include a video work lunch or even just a quick call to break up the day and discuss current events.

Thinking outside of the box to connect and collaborate will ensure your teams feel supported and work more effectively and efficiently. Even though working remotely for your organization may be temporary, these tips can help to build greater cohesion with your organization.