

A Techlist Checklist for Remote Work

By Jason Walker

Bob Dylan coined the phrase “times they are a-changin.”

We are likely reading this post while working from home. Our in-person collaboration with employees and customers has been limited or suspended. Tools that we may have deemed as secondary in our operations must now be prioritized as a staple for sustaining the agency.

If you are seeking a checklist of essential tools and services that empower your remote workflow, we have provided a collection of technology hardware and software recommendations that help eliminate disruption in your processes.

✓ **Employee Collaboration Software**

The goal is to recreate office collaboration in a digital environment. Online tools like Slack, Microsoft Teams, and Trello enable communication, project management, group meetings and document sharing. Check out the following link from Tech Radar for additional context and to learn how simple it is to activate any one of these solutions for your workforce:

✓ **Company Website**

Most agencies have a website, so use your digital storefront to feature all interactive tools on the homepage immediately. Carve out a special content section that provides reassurance to your customers that business—although remote—is better than ever. In this section, hyperlink to all site tools that enable human interaction with your producers and CSRs. Reinforce your phone number, access to your chat tool, company email address, policy rating and claims tools, and first- and third-party customer service portals.

✓ **Telephone**

Telephones are critical but often overlooked. Your staff likely left the desk phone behind, so be prepared to reimburse their mobile phone plans or provide a VoIP soft-phone platform that is accessible through their laptop. Solutions like SalesLoft, Five9, and Ring Central are just a few platforms that quickly make your team scalable and available. Pair your solution with a good pair of wired or Bluetooth Jabra headphones to ensure a quality experience.

✓ **Email Marketing**

With the consistent flow of communication during these critical times, it means you will need to reciprocate with bulk announcements and messages of encouragement and education. Many agencies have solutions tied into their existing digital marketing and web platforms. In addition, there are industry agnostic and intuitive solutions like MailChimp, Drip, Constant Contact, and Email Octopus. Depending on the necessity for third-party integrations, SMS capability, and total number of customers, you can find a great solution at little to no cost in this saturated category.

✓ **Web Cam**

It is not uncommon to have grainy images, lag, and connection and sound issues using the laptop's native camera. Fortunately, the selection of web cams is as abundant as email marketing platforms. Tried and true manufacturers that provide solutions ranging from one-to-one discussions up to small conference room and group settings include Logitech and Microsoft. As you work with commercial lines and even select personal lines customers, you are able to ensure an experience that is like sitting together in the same room.

✓ **Online Meeting Software**

With a quality web cam, the next step is an online meeting solution. There are completely free solutions like Google Hangout that allows you to launch quick meetings with a gmail account. FreeConferenceCall.com is also free and mimics paid solutions by providing a dedicated phone number, recording capabilities, screenshare, branding ability, and scheduling integration with Microsoft Outlook. As you begin adding monthly investments, ease of use and all-in-one solutions like Uber Conference and JoinMe offer packages usually identified by reporting platforms and attendee thresholds while eliminating encumbrances like PINs and IDs. Finally, enterprise solutions like GoToMeeting and WebEx have been in the industry longer and are the staple offerings.

✓ **E-signature**

Finalizing agreements and contracts is a given in this industry and usually marks the beginning and end of document flow and transactions. There are a few ways agencies procure signatures, including in person, digitally, and even fax. Without the opportunity to interact face-to-face, having a solution that accommodates your customers is key. In addition to solutions provided by management systems, Adobe Sign and DocuSign are widely used across industries and have security in mind. Also, solutions like PandaDoc and InsureSign have editable proposal templates and SMS capabilities to expand signature opportunities across devices. And if some customers require fax, there are e-fax solutions like HelloFax, RingCentral Fax, and Fax.Plus are adequate but lack quality app experiences.