\*This is just a template and you need to make this to be used in your practice

Beginning Monday, Date, **Company name** will be transitioned into a remote office. We expect this to last through Date, but this may be adjusted depending on how things unfold. We will keep you up to date.

# What does COVID-19 mean for Company name?

Some extra time at home but business as usual. Stay healthy, exercise, keep doing what you know, and remember to keep calm- we’ll get through this together! It is especially important right now to step up for client work. Aka NO BALLS DROPPED. Our clients are feeling the pains of COVID-19, but we have an opportunity to deliver a ton of value right now and be the "bright side" of their workday.

# General Guidelines

All team members should be available during the assigned business hours of **9:00 am - 5 pm for** communication through such methods as email, phone, and Slack. Phone calls should be responded to within ?? minutes (unless in a scheduled meeting or lunch break). Responding to messages in Slack should be regular but not your primary focus. Responding once per hour should be enough.

Time off or schedule changes should continue to be scheduled through iSolve in accordance with our Time Off policy.

# Home Set-up

All team members are encouraged to take office materials home as needed (chair, second monitor, mouse, headphones, notepads, etc). Find a dedicated table or desk in your home that is the correct height. Setup with a supportive comfortable chair and good lighting.

# Project/Practice Management: XPM ,Time Doctor

? will continue to be our primary method for tracking jobs. As always it is critical that all tasks are recording accurately and completely. We will be using Time doctor to record our time during the day and this is how we clock in and out every day.

# Communication: Slack & Zoom

While working as a fully remote team, it is imperative that team members communicate often (if not more often than normal) to ensure that day-to-day activities continue without interruption. During this period, all internal and external tasks/processes should continue with zero disruptions to efficiency, accountability, or client satisfaction. Ensure you’ve instegrated Slack with [Outlook/Google] Calendar to automatically show you as being in a meeting if you have an internal or client meeting.

# The following protocols will be used during this time:

**Morning check-in** - We’ll be taking 15-20 min to check-in at the start of each day (**? am**). This will be a time to share what’s on your plate for the day and ask for help with anything you may need from your team. We will post the min of every morning meeting with the brief of the whole team in daily Slack channel

**Lunch &Breaks** - Let the team know when you plan on stepping away from your workstation whether it’s for

something like lunch or to take a walk. You can do this by setting your “Status” in Slack. Also, make sure you change your status in [Cradle](http://www.cradle.io) to away

**Zoom calls (voice & video)** should be used as often as necessary for communication among team members. All meetings will be “Video-on”. Dress for your day and ensure you’re in a tidy, presentable location during this time.

All team members have upgraded Zoom accounts. Here is a quick Zoom training video <https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials> and if you need any more help contact xxxx

**Internal Meetings:** During periods of remote work, all internal meetings should continue as planned, hosted on Zoom, unless otherwise noted. Put all internal meetings into your [Outlook/Google] Calendar and invite those who need to be present.

**Client Meetings:** During periods of remote work, all recurring and “one-off” client-facing meetings should continue without interruption. At this time, all planned or scheduled “in-person” meetings should be transitioned to virtual (Zoom WITH Video) or rescheduled for a later date in time. Regardless of whether an obligation is virtual or physical, all team members, should look neat, clean and well-groomed and should be dressed appropriately for the business environment. Team members are expected to use good judgment. Put all client meetings into [Outlook/Google] Calendar to ensure the rest of the team know if you’re unavailable for other meetings.

**Physical letters and files**

XXXXXXX will check the PO Box on a regular basis and if there are any documents he/she receives to do with your clients, he/she will scan them and put them into SuiteFiles.

**Phone Calls**

All our phone communication would go through Cradle so please make sure to install the app on your laptop computer and use Cradle for all outgoing calls. Do no use your home or mobile phone. Make sure all client phone numbers are up to date in HubSpot and keep your status up to date in Cradle. Try to warm transfer any call that you receive to make sure the other side is available and ok to talk before you transfer. If you’re busy working, you can manually set your presence to Busy or Offline to let your teammates know that you can’t be contacted.

# Other Stuff

* The goal during this time is to get to the other side as strong and healthy as possible. Both financially and physically.
* If you do begin feeling sick during this time, follow standard ‘sick protocol’, stay hydrated and get lots of rest. Please keep us informed if you or someone you've come in contact with gets ill or experiences symptoms during your time away from the office.
* If you need to come by the office at any time, please give xxxxxx a heads up. No-one is banned from the office, but a little separation of space can be beneficial during this time.
* We are here for you! If you need anything at all during this time or have any questions xxxx can be reached 021xxxxxxxxxxxxxxx.

# Remote Tips

* Join every call with clients by VIDEO.
* Use your headphones for better audio - ensure both the microphone and the speakers for the headset are being used.
* Mute yourself when on a video call/conference and you’re not speaking. Avoid speaking when someone else is speaking.
* Reach out to XXXXXXXXXXX for any other remote tips for staying focused and on track.

# To-do Checklist

* Review your to-do list for the next couple of weeks and organise your priorities. Take home any needed notes or lists you may have around your desk. Even better - type them into HubSpot!
* Take home any equipment, supplies, and materials (don’t forget your laptop charger!).
* We recommend taking home an ethernet cable and using this instead of Wifi.
* Review your calendar and update any in-person meetings to Zoom invites.
* Access your Zoom account before you leave and set a test meeting if you haven’t previously used Zoom.
* Make sure to set up your meeting link in HubSpot to be online only and include your Zoom link in the email.
* Check the fridge for any food or leftovers you might have. Anything remaining will be thrown away.
* If you run out of the toilet paper make sure to scan client files and load them in SuiteFiles and then you can use them as toilet paper 😊

**Helpful links**

* Markezing.com - Contact [admin@markezing.com](mailto:admin@markezing.com)
* Suite Files - [molly@suitefiles.com](mailto:molly@suitefiles.com)
* Cradle - [info@cradle.io](mailto:info@cradle.io)

**Apps we recommend**

* Hubspot [Free CRM](https://app.hubspot.com/signup/crm?hubs_campaign=partners-website-signup-link&partnerId=3820554&utm_medium=acquisition-referral)
* Cradle.io for Virtual phones (VOIP) - <https://www.cradle.io/>
* Suite Files for Document management - <https://www.suitefiles.com/>
* Zoom for virtual meetings - <https://zoom.us/>
* Slack for internal communication - <https://slack.com/intl/en-nz/>
* Time Doctor - [https://www.timedoctor.com/](http://www.timedoctor.com?a_aid=markezing)

**Some good tips for your staff to work from home**

<https://www.bbc.com/worklife/article/20200312-coronavirus-covid-19-update-work-from-home-in-a-pandemic>

<https://www.forbes.com/sites/bryanrobinson/2020/03/14/9-tips-to-be-productive-when-working-at-home-during-covid-19/#17e5036a5a38>