

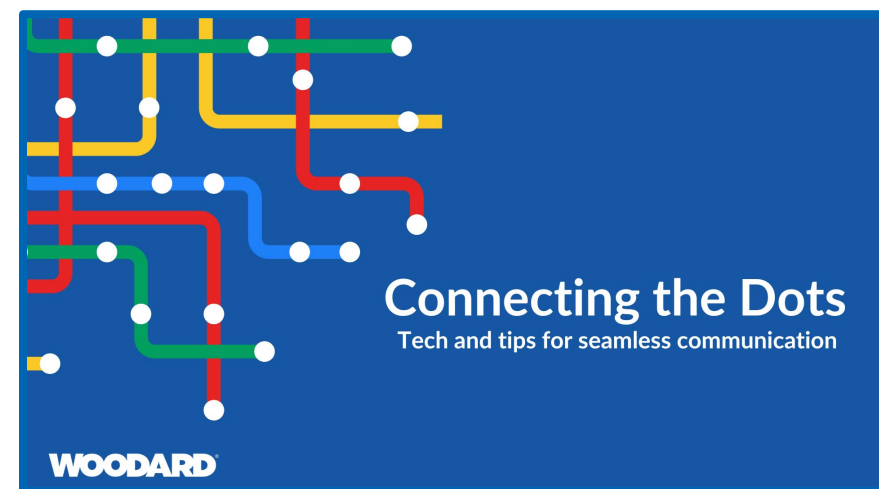
Connecting the Dots

Tech and tips for seamless communication

WOODARD®

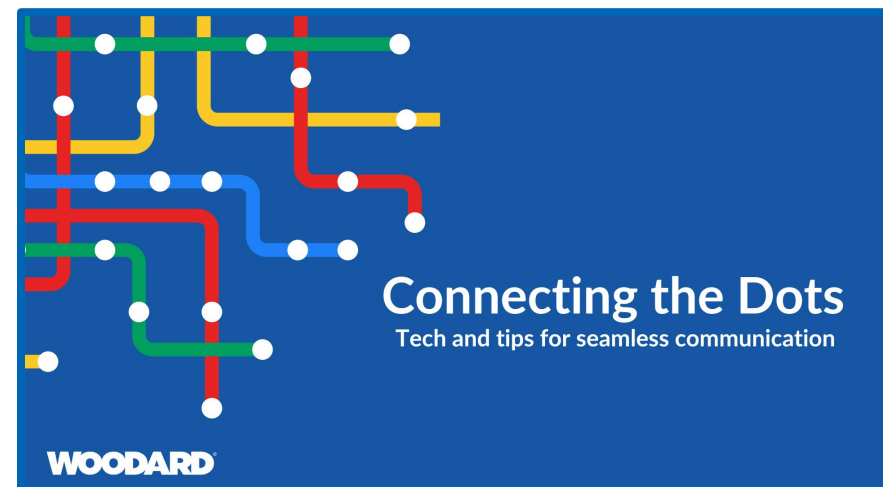
Learning Objectives

- **Strategies to Eliminate Information Silos:** The webinar will provide strategies to recognize and address information silos within firms, focusing on fostering a culture of open communication and collaboration through the use of integrated technology solutions.
- **Identify and Implement Efficient Communication Tools:** Participants will learn to identify the most effective communication tools and platforms for client interactions, and how to implement these technologies to enhance client service and team collaboration.
- **Develop and Enforce Communication Policies:** Attendees will gain insights into structuring internal and external communication strategies that ensure data security while maintaining transparency, including the development and enforcement of comprehensive communication policies.



Section 1

Strategies to Eliminate Information Silos



What is an information silo?



Paper



Local Drives



Email Exchanges



**Voiced
Information/Exchanges**



People (i.e., Brains)

The effects of information silos on a firm



Breaking down silos requires 3 components



**Integrated
systems**



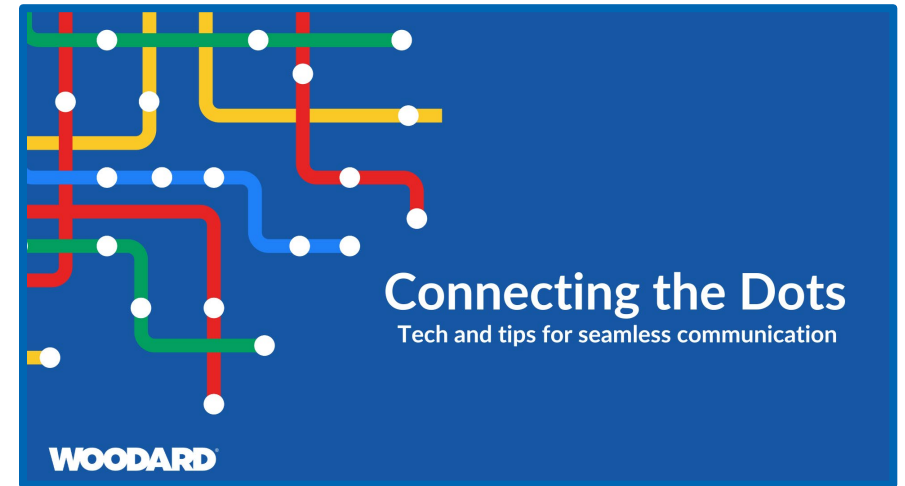
**Real-time
Collaboration**



**Centralized
Communication**

Section 2

Identify and Implement Efficient
Communication Tools



Go Paperless

- Scan all paper documents that are relevant to the company's current operations
- Transfer and store documents within a single, company-managed, cloud-based document management system
- Leverage tools that include:
 - Optical Character Recognition
 - Indexing



Cloud Drives

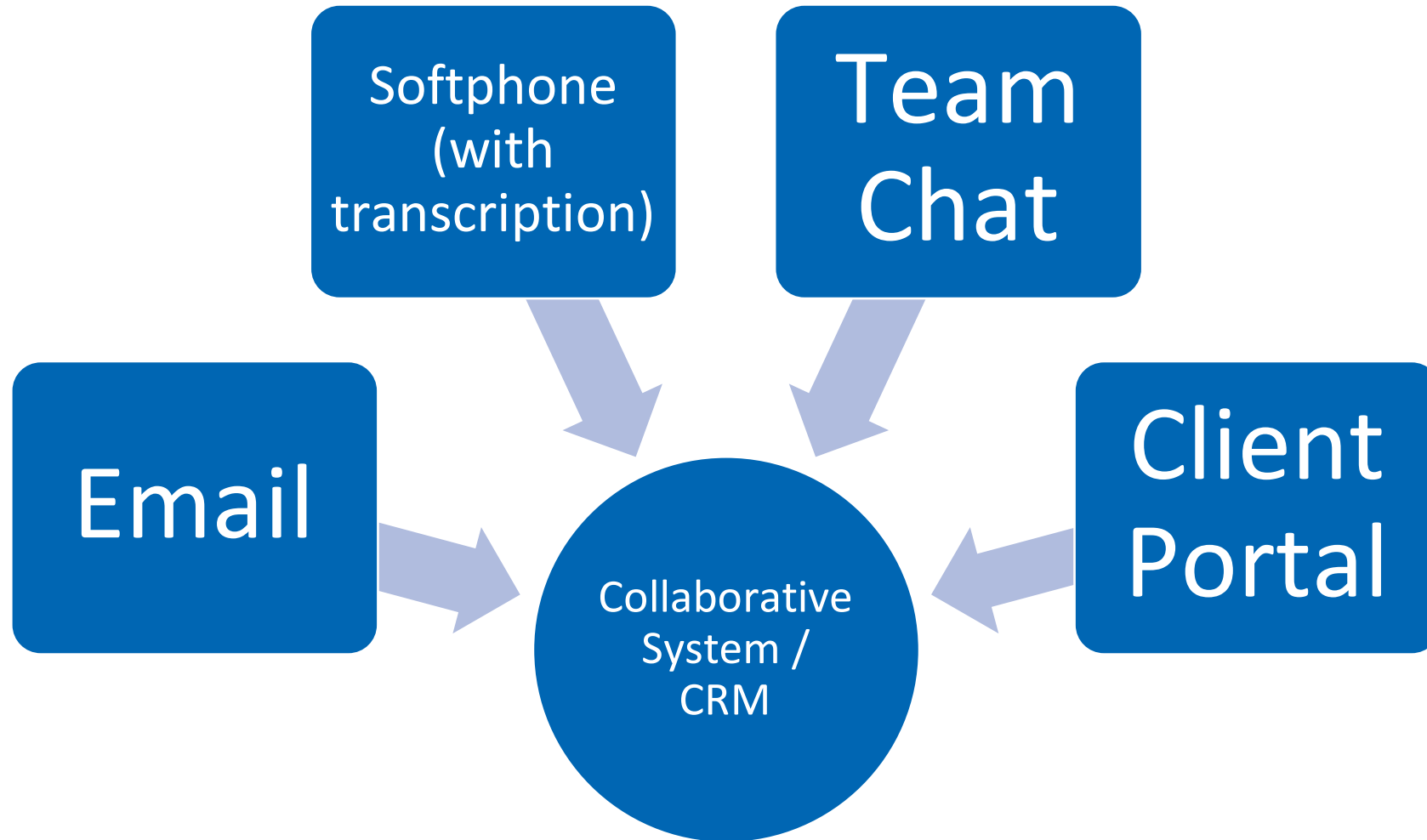
- Displace local servers with a cloud-based file management system
- Client interfacing file collaboration
- Integrate where possible



Google Drive



Centralized Communications



Get out of your head!

- Shared OneNote or Evernote
- CRM solution with comprehensive client information capture
- Practice management solution with standardized templates



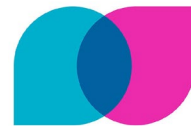
Solutions



Microsoft Teams



slack



Liscio



Client Hub

Onboard. Engage. Empower.



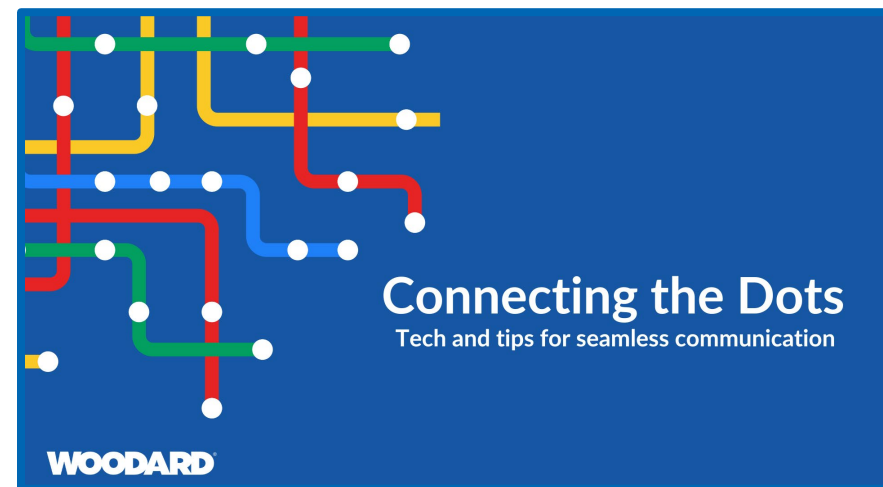
FinancialCents



KARBON

Section 3

Develop and Enforce Communication Policies



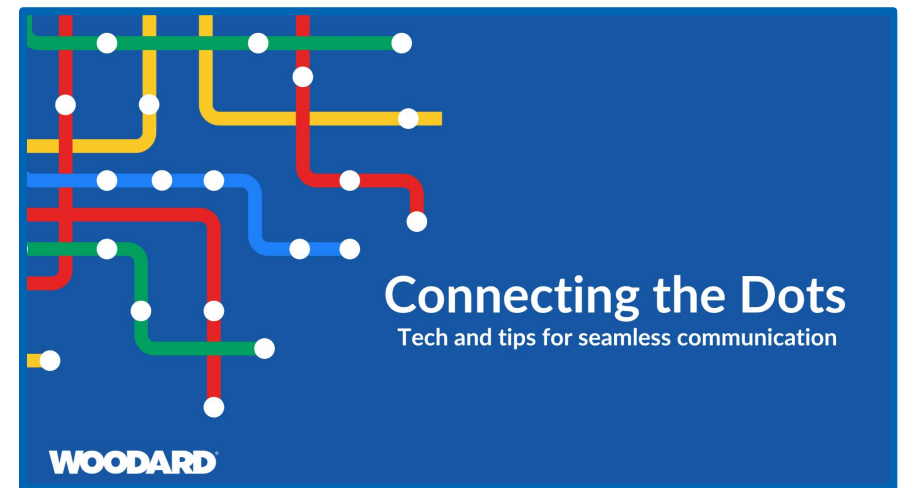
Even the best tools need direction

- Policies provide consistency and expectations, and
- Promote accountability within an organization



Effective communication policies

- Should be aligned with the culture of your firm
- Defines *how* technology is expected to be used
- Provides clear direction for when things go off the rails



Examples of Effective Communication Policies

Clear Email Protocols

- Usage
- Response times
- CC and BCC
- Etiquette

Meeting Management Policy

- Agenda setting
- Documentation
- Follow-up

Data Sharing and Confidentiality

- Internal protocol
- External protocol
- Data protection
 - GLBA
 - WISP

Use of Tools

- When and how to use
- Training
- Feedback
- Structure
- Response time

Remote Work Communication

- Availability
- Virtual meeting etiquette
- Use of tools
- Response time

Crisis Communication Plan

- Protocols for internal and external communication
- Roles and responsibilities
- Channels

Implementing Communication Policies

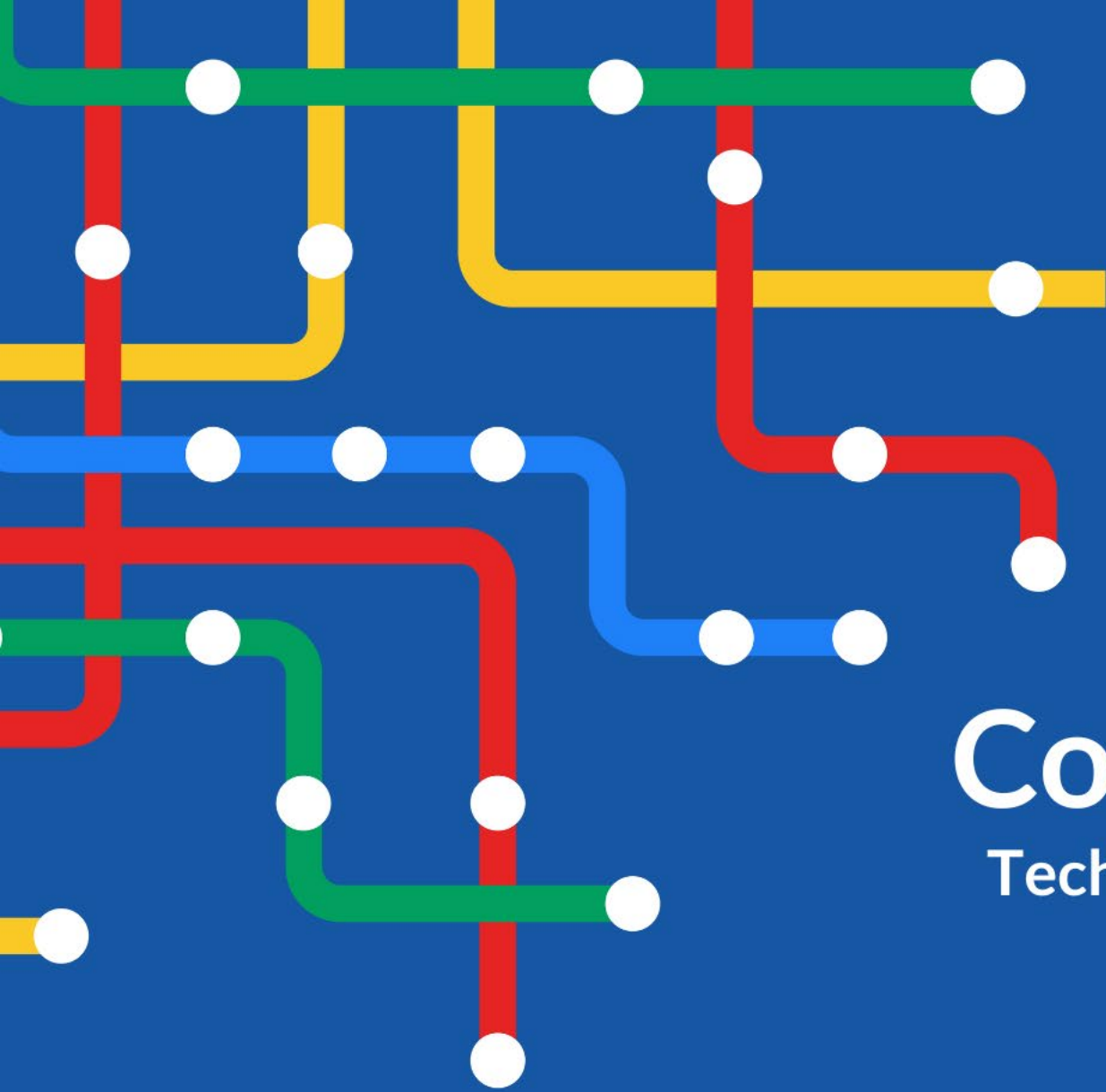


The culture of your firm should be embedded in every step!

How to get started

1. Define the culture of your firm
2. Review existing tools and policies
3. Create a plan
4. Find the right tools
5. Implement





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